Section 2 - Appointment Menu, cont.

Section 3 - Outputs Menu 3-1

ENROLLMENT REVIEW DATE ENTRY
This option is used to enter the date when an NSC outpatient clinic enrollment has been reviewed.

FIND NEXT AVAILABLE APPOINTMENT
This option is used to make a quick search for the next available appointment in a selected clinic.

MAKE APPOINTMENT
This option allows designated personnel to schedule clinic appointments and to book ancillary appointments such as lab, x-ray, and EKG.

MAKE CONSULT APPOINTMENT
This option is a clone of the Make Appointment option except that it allows holders of the SC CONSULT security key to make appointments for patients who are designated as “restrict consults” through PCMM.

MULTIPLE APPOINTMENT BOOKING
This option is used to make multiple appointments for a patient on a consecutive day/week basis.

MULTIPLE CLINIC DISPLAY/BOOK
This option is used to schedule a patient to 2-4 different clinics for one particular date. All chosen clinics must have an available slot on at least one identical day.

NO-SHOWS
This option is used to enter no-shows into the system. No-shows are those patients who did not report for scheduled appointments without previously notifying the facility.

PRIMARY CARE TEAM/POSN ASSIGN OR UNASSIGN
This option is used to assign patients to and discharge patients from PCMM teams and associated positions for primary care assignments.

Appointment Management

Introduction

The Appointment Management option is used to view appointments for a selected patient or clinic and to execute appropriate action(s) against these appointments, such as check in and check out.

If a patient is selected, all appointments for the selected patient within the designated time frame will be displayed. This option is also designed to allow you to wand the record tracking barcode on the patient's medical record in selecting a patient.

The beginning date of the report range is determined by the APPT SEARCH THRESHOLD parameter in the Scheduling Parameters (today's date minus the parameter entry), and the ending date will be 999 days in the future.

If selecting a clinic, you will be prompted for the date range of the display. Only clinic appointments within the designated time frame and with a status of NO ACTION TAKEN or ACTION REQUIRED are displayed.

Following is a list of actions that may be accomplished through the Appointment Management Screen.

CI Check In	PT Change Patient
CO Check Out	UN Unscheduled Visit
CL Change Clinic	EC Edit Classification
MA Make Appointment	CD Change Date Range
PR Provider Update	CA Cancel Appointment
EP Expand Entry	DX Diagnosis Update
NS No Show	AE Add/Edit
DE Delete Check Out	DC Discharge Clinic
RT Record Tracking	AL Appointment Lists
PD Patient Demographics	CP Procedure Update
PC PC Assign or Unassign	TI Display Team Information

When "Check Out" (CO) is selected from the Appointment Management Screen, you have the option to display the Checkout Screen which uses the same type of format as the Appointment Management Screen. By selecting certain actions, such as Unscheduled Visit, Make Appointment, and Cancel Appointment, you automatically access other scheduling options. When Record Tracking is selected, you automatically access the Record Tracking software.

Appointment Management

Introduction

The Edit Classification action permits you to edit required classifications associated with regular appointments and stand-alone add/edits. The classifications include those questions related to whether or not the treatment was for a service connected condition, or related to Agent Orange/ionizing radiation/environmental contaminant exposure. These questions appear if they are applicable to the patient.

All required classifications must be answered to complete the checkout process. You are not allowed to up-arrow out of these questions unless they are already answered or your site has set the ALLOW '^' OUT OF CLASS. parameter in the Set up a Clinic option (Supervisor menu) to YES.

You may now make primary care team and position assignments/unassignments through this option.

Example

```
Select Patient name or Clinic name:   HANSEN,H

     Searching for a Patient  HANSEN,H         02-03-71     123450101     YES
  NSC VETERAN     SMITH,DR. JAY            SMITH,DR. JAY


Appt Mgt Module               Jul 30, 1997 09:10:12         Page:    1 of    1
Patient: HANSEN,H (0101)                                             Outpatient
Total Appointment Profile                                  06/30/97 thru 04/24/00
Clinic                        Appt Date/Time       Status
    1   Ultrasound            Jul 29, 1997 10:30   Action Req/Checked Out 08:03
    2   Ultrasound            Jul 29, 1997 15:30   Cancelled By Patient &
    3   X-ray                 Jul 30, 1997 09:00   No Action Taken/Today
    4   Ultrasound            Aug 11, 1997 08:00   Future


          Enter ?? for more actions

CI  Check In            CL  Change Clinic          PR  Provider Update
UN  Unscheduled Visit   CD  Change Date Range      DX  Diagnosis Update
MA  Make Appointment    EP  Expand Entry           DE  Delete Check Out
CA  Cancel Appointment  AE  Add/Edit               CP  Procedure Update
NS  No Show             RT  Record Tracking        PC  PC Assign or Unassign
DC  Discharge Clinic    PD  Patient Demographics   TI  Display Team Information
AL  Appointment Lists   CO  Check Out
PT  Change Patient      EC  Edit Classification
Select Action: Quit//  CI=3   Check In
    3   X-ray                 Jul 30, 1997 09:00   No Action Taken/Today
        ...checked in JUL 30, 1997@09:10
```

Appointment Management

Example

```
Appt Mgt Module              Jul 30, 1997 09:10:12          Page:    1 of    1
Patient: HANSEN,H (0101)                                                Outpatient
Total Appointment Profile                                   06/30/97 thru 04/24/00
Clinic                       Appt Date/Time        Status
    1   Ultrasound           Jul 29, 1997 10:30   Action Req/Checked Out 08:03
    2   Ultrasound           Jul 29, 1997 15:30   Cancelled By Patient &
    3   X-ray                Jul 30, 1997 09:00      Action Req/Checked In  09:10
    4   Ultrasound           Aug 11, 1997 08:00   Future


          Enter ?? for more actions

CI  Check In              CL  Change Clinic          PR  Provider Update
UN  Unscheduled Visit     CD  Change Date Range      DX  Diagnosis Update
MA  Make Appointment      EP  Expand Entry           DE  Delete Check Out
CA  Cancel Appointment    AE  Add/Edit               CP  Procedure Update
NS  No Show               RT  Record Tracking        PC  PC Assign or Unassign
DC  Discharge Clinic      PD  Patient Demographics   TI  Display Team Information
AL  Appointment Lists     CO  Check Out
PT  Change Patient        EC  Edit Classification
Select Action: Quit//  <RET>
```

Primary Care Team/Posn Assign or Unassign

Introduction

This option is used to assign patients to and discharge patients from PCMM teams and associated positions for primary care assignments. At any given time, a patient may only be assigned to one primary care team and one primary care practitioner.

Only active teams and practitioners are available for selection. PCMM Business rules relating to the Restrict Consults and Assignment Date features shall be followed in this option.

Once the patient name is entered, the software checks to see if the patient already has primary care assignments. Based on that status, the option displays the applicable prompts to accomplish the following actions.

- Assign patient to Primary Care team.

- Assign patient to PC practitioner position. You can look-up by either position name or the current practitioner assigned to the position.

- Unassign from team. If a patient is assigned to a PC position, both the PC position and PC team will be unassigned. If the patient is assigned to a non-PC position, the PCMM GUI interface must be used.

- Unassign from position. If the patient is unassigned from the PC practitioner position and has other position assignments on the team, you are given the opportunity to unassign from those positions. If you do not unassign from all positions, the team unassignment will not be made.

While assigning/unassigning from a position, if the position has an associated clinic, the user will be prompted to enroll/discharge the patient from that associated clinic.

MailMan messages are generated as a result of the actions taken while utilizing this option.

You must hold the SC PCMM ROLL security key to access this option.

Primary Care Team/Posn Assign or Unassign

Example

```
Select Appointment Menu Option:  Primary Care Team/Posn Assign or Unassign
Primary Care Team/PC Practitioner Assignment/Unassignment

      Prior to using this option, PCMM's Graphical User Interface (GUI)
      must be used to:
        1) Setup active primary care team(s)
        2) Setup active PC Practitioner position(s)
        3) Assign practitioner to position(s)

      A patient can be assigned to only one PC team and one
      PC Practitioner Position on a given day.  The patient must be
      assigned to a position's team to be assigned to the position.

      Note: You must use the PCMM GUI if the patient was:
         o  unassigned from PC Practitioner today or in the future
         o  assigned to a future PC assignment.


Select PATIENT NAME:  CALDWELL,JAMES  11-10-14   065017747   YES   SC VETERAN
Checking PC Team and Position Status...


No current PC Team/PC Practitioner Assignments

About to Assign CALDWELL,JAMES to a primary care team
Select TEAM NAME:  GREEN
Assignment date: TODAY//  <RET>   (JUL 27, 1998)
Are you sure (Yes/No)?  YES
Sending NEW Patient-Team Assignment Message
Choose way to select PC Practitioner POSITION:

     Select one of the following:

          0         NONE
          1         BY PRACTITIONER ASSIGNMENT
          2         BY POSITION ASSIGNMENT

Enter response: 1//  2  BY POSITION ASSIGNMENT

About to Assign CALDWELL,JAMES to PC Practitioner Position
POSITION's NAME:  PHYSICIAN    GREEN   KILMADE,MIKE   DENTAL   [KILMADE,MIKE]
Assignment date: JUL 27,1998//  <RET>   (JUL 27, 1998)
Are you sure (Yes/No)?  YES

The PHYSICIAN is associated with the DENTAL clinic.
Do you wish to enroll the patient from this clinic on JUL 27,1998?
Enter Yes or No: YES//  NO
Position Assignment made
Team Assignment made
```

Primary Care Team/Posn Assign or Unassign

Example

MailMan Message

```
Subj: NEW PATIENT-TEAM ASSIGNMENT for Patient (C7747)  [#68729] 07 Aug 98
07:09   11 Lines
From: BAILEY,CURTIS  in 'IN' basket.   Page 1
----------------------------------------------------------------------------

Current Patient Team Data:
==========================
PATIENT:               CALDWELL,JAMES
TEAM ASSIGNED DATE:    AUG 07, 1998
TEAM ASSIGNMENT:       GREEN
ASSIGNMENT TYPE:       PRIMARY CARE
USER ENTERING:         BAILEY,CURTIS
DATE/TIME ENTERED:     AUG 07, 1998@07:09:16

Current Primary Care Management Data:
  PC Team:               GREEN      Phone: 990-3355


Select MESSAGE Action: IGNORE (in IN basket)//
```

Appendix - Primary Care Management Module

Introduction

Overview of the Primary Care Management Module
The Primary Care Management Module was developed to assist VA facilities in implementing primary care. PCMM supports both primary care and non-primary care teams. Teams are groups of staff members organized for a certain purpose. The software allows you to setup and define a team, assign positions to the team, assign staff to the positions, assign patients to the team, assign patients to practitioners, and reassign patients from one team to another team.

Tools are provided with the software to facilitate the startup process. These tools use the site's data (where available) to automate the following tasks: identify patients to be assigned to primary care; assign patients to teams; assign patients to practitioners via team positions.

As part of PCMM, you are able to control the transmission of MailMan messages to team positions. MailMan messages are categorized into patient death, inpatient activity, consult activity, and team activity. For each category, you can elect to have a position get messages for all patients on a team, only patients associated with that team position, or not send messages.

Numerous reports may be generated. Some of the reports are affected by site parameters. All reports may be printed through both the roll and scroll interface and the GUI (graphical user interface). Patient-oriented outputs, practitioner-oriented outputs, and team-oriented outputs may be produced.

The *Mass Team/Position Discharge* option provides the ability to discharge large numbers of patients from a team or position at one time. This option is only available through the roll and scroll interface. A confirmation MailMan message is generated from the utilization of this option.

Functionality that was previously only available through the GUI is now available through roll and scroll. This includes primary care team/position assignment/ unassignment. This may be accomplished through the *Primary Care Team/Posn Assign or Unassign* Scheduling option and through the *PC Assign or Unassign* action in the Appointment Management option.

Introduction

The PCMM "business rules" provide information on how some of the PCMM fields will be handled for team and team positions. These rules are not intended to be all encompassing, but to allow basic checking within the system to ensure data integrity.

Windows Conventions
The startup, setup, and assignment functions for PCMM use a graphical user interface (GUI). You may refer to the Windows Conventions Section for an explanation of the windows elements and form buttons used by the module.

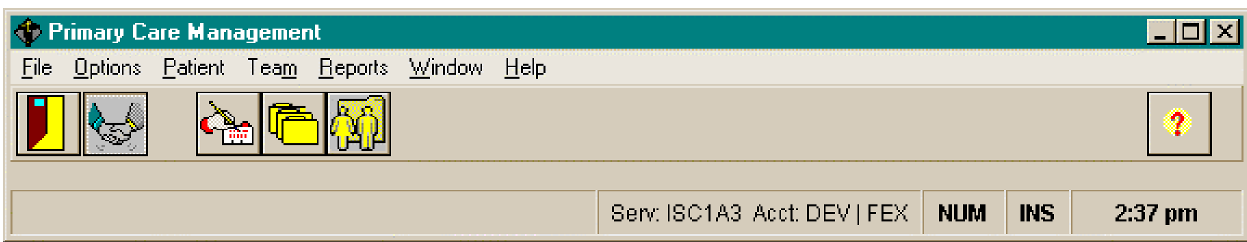
Autolinks - (This functionality has been disabled.)
Autolinks connect a team with a set of wards, inpatient beds, practitioners, specialties, and clinics.
NOTE: You cannot assign a patient to a primary care team or practitioner via autolinks. Autolinks will be used for inpatient teams by OE/RR.

Report Templates
The Query Template Utility is provided on the GUI side to create report templates with a specified sort sequence and with specified category selections (divisions, teams, etc.). The templates may then be used to print the reports in the future without having to make sort selections and category selections each time.

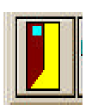
Starting PCMM

When the Primary Care Module is started, the Menu and Toolbar below is displayed. Select either the FILE | **V***IST***A** LOGON menu bar command or the Connect to/Disconnect from **V***IST***A** speedbutton to start.

Notice the status bar on the bottom of the screen consisting of five segments. The first segment is used to display status messages when a SAVE action has successfully completed. The second segment indicates whether you are connected (if so, where) or not connected to **V***IST***A**. The third shows the on/off status of the NUM LOCK key. The fourth displays insert/overwrite status but is not functional at this time. The fifth contains the current time.



TOOLBAR SPEEDBUTTONS

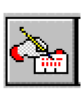


Close Application

Disconnects from the network and closes the application. If the network connection is still active, you will get a confirmation request before closing the application.

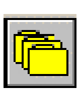
Connect to/Disconnect from **V***IST***A**

Logs on/off the network.



Team Setup

Opens the Select Team dialog box/Primary Care Team Profile form.

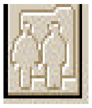


Position Setup

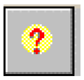
Opens the Select Team dialog box/Primary Care Team Position Setup form.

Starting PCMM

TOOLBAR SPEEDBUTTONS

 **Assign Patients**

Opens the Patient Lookup dialog box.

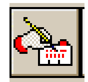
 **Show Associated Help**

Opens the PCMM Help File.

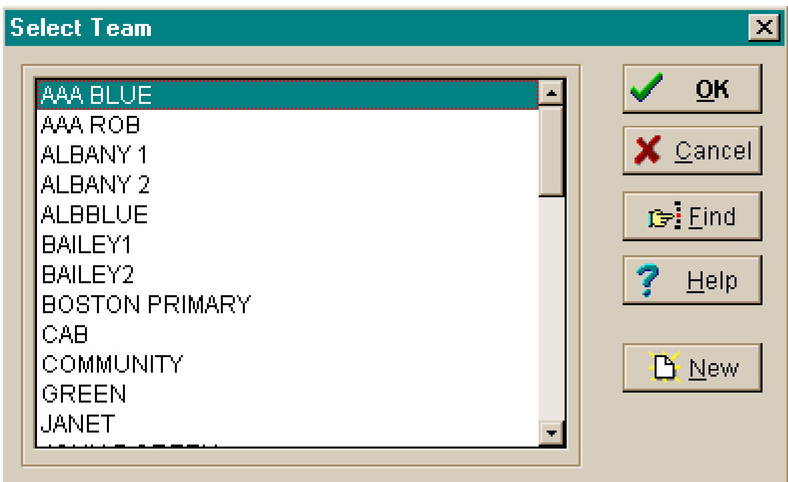
LOGGING ON

When either the FILE|VISTA LOGON menu bar command or the Connect to VISTA speedbutton is clicked, the VISTA Sign-on dialog box opens. System information concerning where you're currently working is provided. Enter your access code followed by the **tab** button. Enter your verify code and click the OK button. (The PCMM option must be assigned to you. If you get a message stating you are not registered to use PCMM, contact your IRM Service.)

Team Setup
Create a New Team

1. Click on the Team Setup toolbar speedbutton  or select the TEAM|SETUP menu bar command.

2. Click the NEW button of the Select Team dialog box and enter the new team name (3-30 characters).



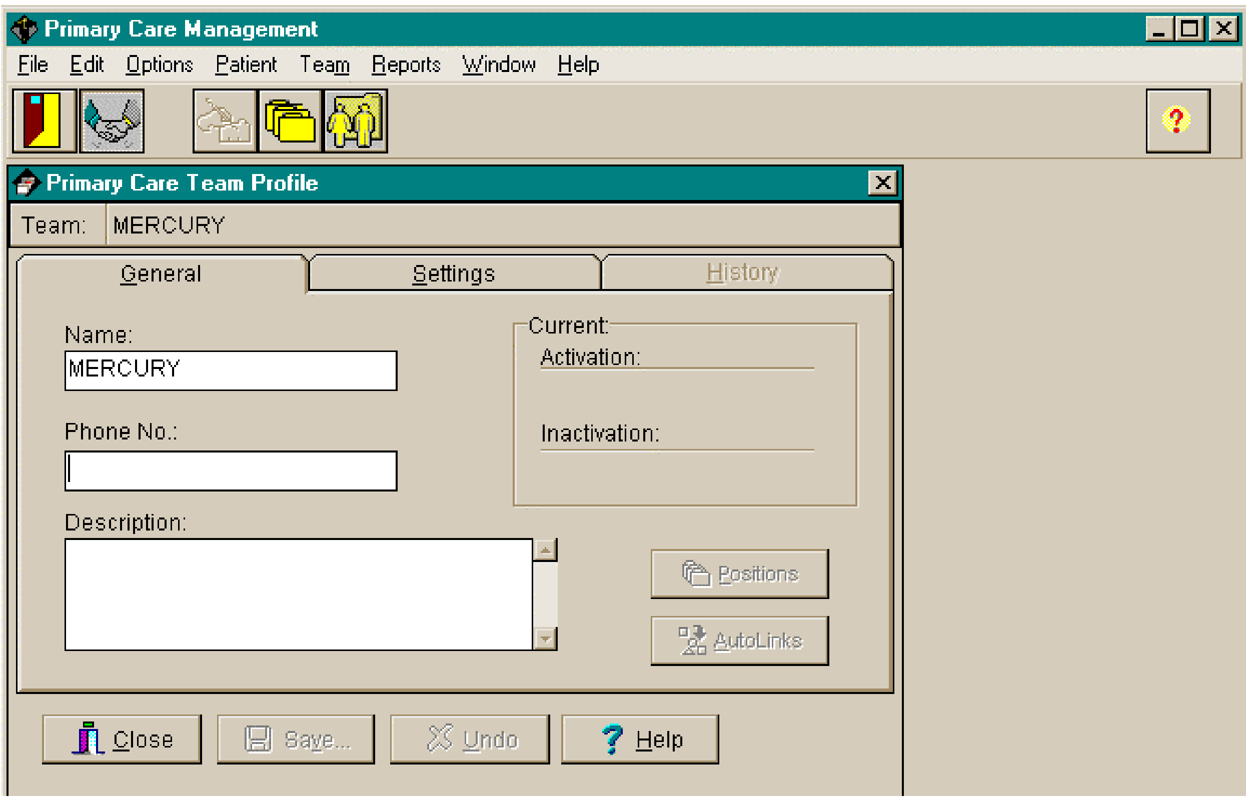
Select Team Dialog Box Information
Click on the desired entry to highlight it, then click on the **OK** button to select. Clicking on **Cancel** closes the dialog box without selecting an entry. The scrollbar can be used to move up and down the list to find the desired entry. The **Find** button can be used to find a specific entry. If more than one match is found, the list box will clear and only the matching entries will be displayed. The **New** button allows you to enter a new team name. After entering the name, click on the OK button within the New Team dialog box.

NOTE: Names are saved in all uppercase letters.
NOTE: If the TEAM/ACTIVE ONLY menu bar command is selected, only active teams appear for selection.

Team Setup
Create a New Team

3. The Primary Care Team Profile form appears. When initially setting up a team, information should be entered on the General and Settings tabs before clicking the SAVE button to store the data. Required fields are signified in this documentation by an asterisk * next to the field name. If all required fields are not completed, the SAVE button will not be enabled and you will not be able to save the information.

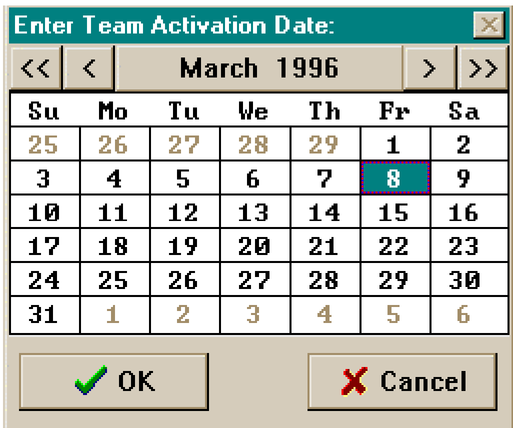
You may refer to the Windows Conventions Section for an explanation of the standard windows objects (i.e., list box, lookup box, ect.) and form buttons.



4. Enter the team information on the General and Settings tabs. (See following pages). When creating a new team, data entry is not required on the History tab. The History tab will not be available for a new team until the initial entry is saved. After you have entered all required data for the new team, click the SAVE button.

Team Setup
Create a New Team

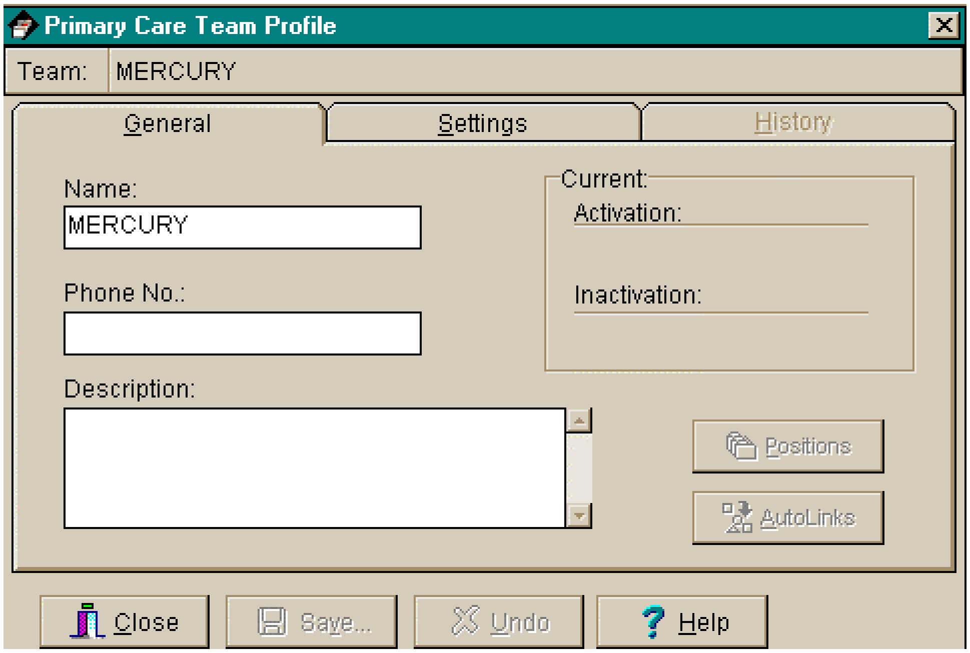
5. The popup calendar appears. Click on the date you wish to enter as the team activation date and click OK. The team has now been established.



If you wish to create positions on the team at this time, go back to the General Tab and click on the POSITIONS button. See the “Assign Positions to a Team” section under Team Setup for instructions.

Team Setup
Create a New Team

GENERAL TAB



FIELD DESCRIPTIONS

***Name (text box)**
The name of the team, 3-30 characters in length. If the new team name matches an existing team name, you will be so notified and asked for a different name.

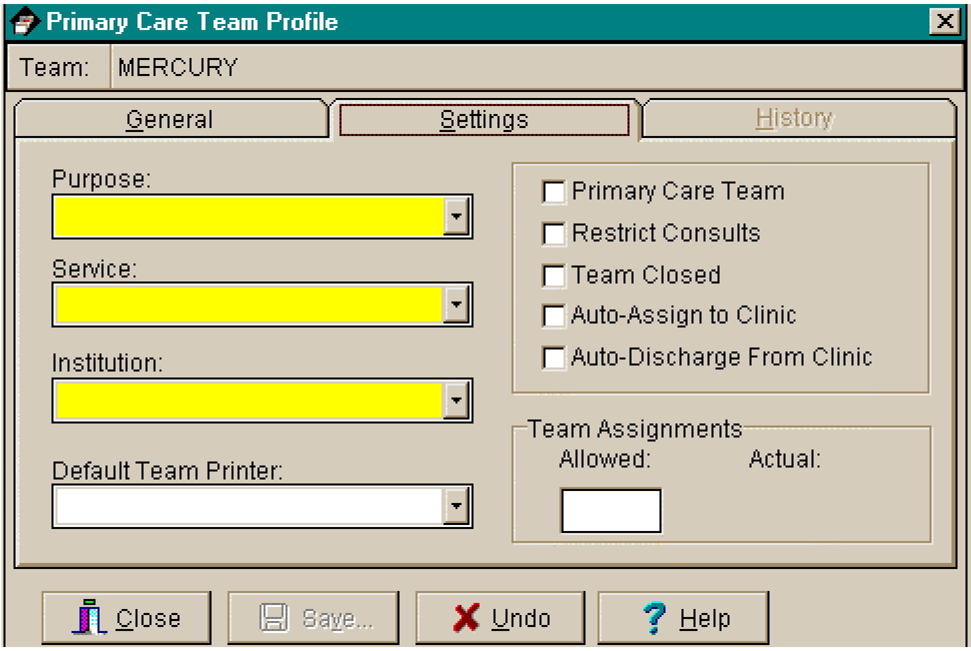
Phone No. (text box)
Enter a phone number for the team, 3-20 characters.

Description (text box)
Any descriptive information specific to the team.

Current Activation/Inactivation
These label fields display the most recent activation/inactivation date for the team.

Team Setup
Create a New Team

SETTINGS TAB



FIELD DESCRIPTIONS

***Purpose (drop down list)**
The Purpose defines the role of the team. Primary care would be the usual choice but other kinds of teams may include Inpatient Ward, Community Care, etc.

***Service (lookup box)**
This is the medical center service most closely associated with the team. It is an entry from the SERVICE file (#49) and includes clinical and non-clinical services.

***Institution (lookup box)**
This is the entry from the INSTITUTION file (#4) associated with the team. It includes VA and non-VA institutions. **NOTE:** Each division at a multidivisional facility has its own entry in the INSTITUTION file.

Default Team Printer (lookup box)
The PCMM reports do not use this field.

Team Setup
Create a New Team

SETTINGS TAB

Primary Care Team (check box)

Click in this box if this team can be the primary care team for any patient. Even if the team's purpose is not primary care, it still may be able to act as a primary care team. Only a team that can act as a primary care team may have a primary care practitioner position assigned to it.

Restrict Consults (check box)

Click in this box to prevent users from making consult appointments to clinics in which this team's patients are not enrolled. Patients who are listed as “restrict consults” may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the Make Consult Appointment option. A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Team Closed (check box)

Click in this box to close the team. Additional patients should not be added to a team if it is designated as closed.

Auto-Assign to Clinic (check box)

Click in this box to automatically assign the patient to a team when he is enrolled in a clinic that is an "associated clinic" of one of the team's positions. This will occur only if the associated clinic is unique to one team. It is recommended that **both** the Auto-Assign and Auto-Discharge boxes be checked or **neither** be checked.

Auto-Discharge from Clinic (check box)

Click in this box to automatically discharge the patient from a team when he is discharged from a clinic that is an "associated clinic" of one of the team's positions. This will occur only if the patient has not been assigned to a team position.

Team Assignments: Allowed (text box)

The maximum number of patients that should be assigned to this team. Users are not prevented from adding additional patients to the team after the team's patient panel (list of patients) has reached this number. You should compare the current number of team assignments with the number allowed to balance team panel sizes.

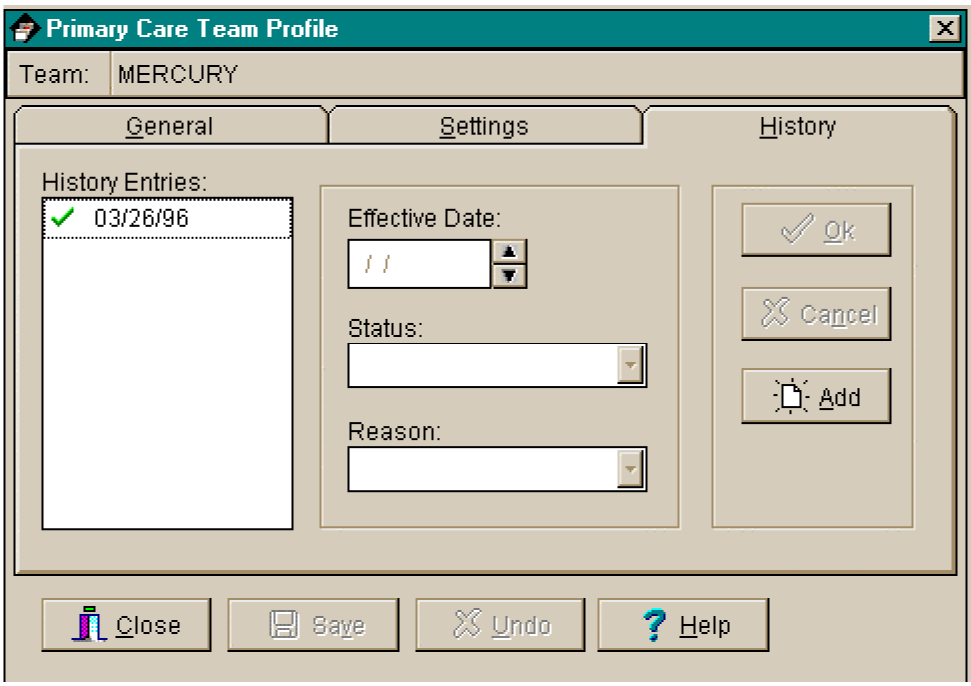
Team Assignments: Actual

This is the number of patients currently assigned to this team.

Team Setup
Create a New Team

HISTORY TAB

When creating a new team, no data entry is required on this tab.



FIELD DESCRIPTIONS

History Entries (list box)

This display shows the history of status change dates for this team. Double clicking an entry **or** highlighting an entry and pressing the spacebar displays that entry's data in the edit boxes. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date.

*Effective Date

This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date (month/day/year) must consist of two characters (i.e., 02/22/96).

Team Setup
Create a New Team

HISTORY TAB

***Status (drop down list)**
This is the status of the team as of the effective date.

***Reason (drop down list)**
This is the reason for the change in the team's status.

Team Setup
Assign Positions to a Team

If you have clicked on the Positions button on the General Tab of the Primary Care Team Profile form, begin at Step 3.

1. Select the TEAM|POSITIONS menu bar command.

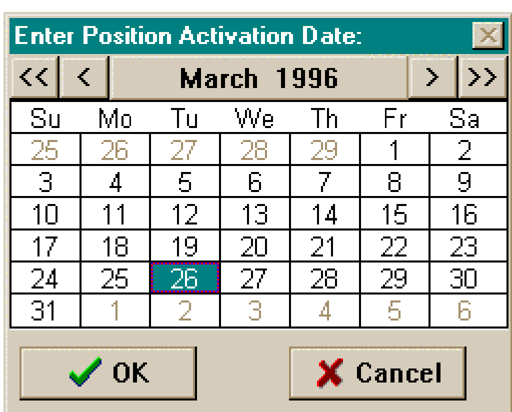
2. Select the team from the Select Team dialog box and click the OK button.

3. The Primary Care Team Position Setup form appears along with the New Position dialog box. Enter the name of the new position and click OK.

4. Enter the position information on the General, Settings, and Messages tabs (see following pages.) When initially creating a position, information should be entered on the General, Settings, and Messages tabs before clicking the SAVE button to store the data. No data entry is required on the History tab when creating a new position. All data displayed in the edit boxes applies to the position displayed in the forms header.

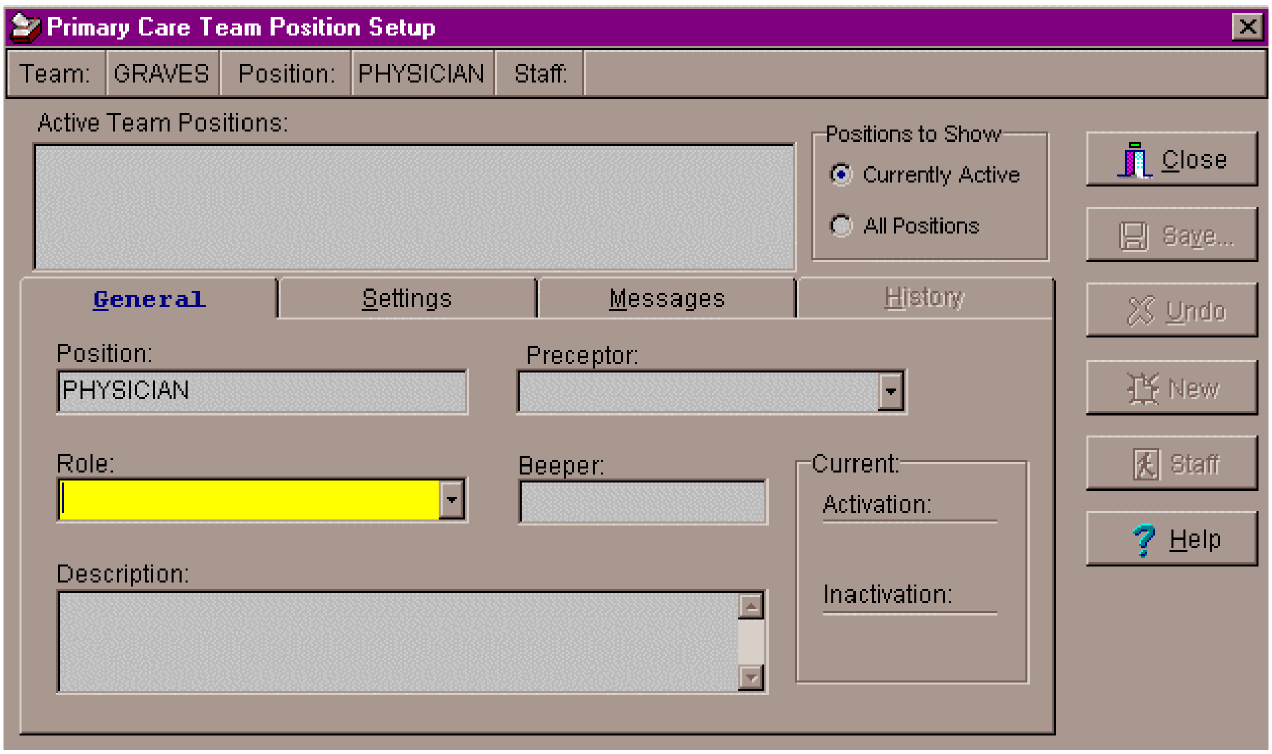
Required fields are signified in this documentation by an asterisk ***** next to the field name. You will not be allowed to save until all required fields have been completed.

5. After you have entered all required data for the new position and clicked the SAVE button, this popup calendar appears. Click on the date you wish to enter as the position activation date and click OK. The position has now been established.



Team Setup
Assign Positions to a Team

If you with to assign a staff member to the position at this time, click on the STAFF button. See the "Assign Staff Member to a Position" section under Team Setup for instructions.



FIELD DESCRIPTIONS

Team Positions (list box)

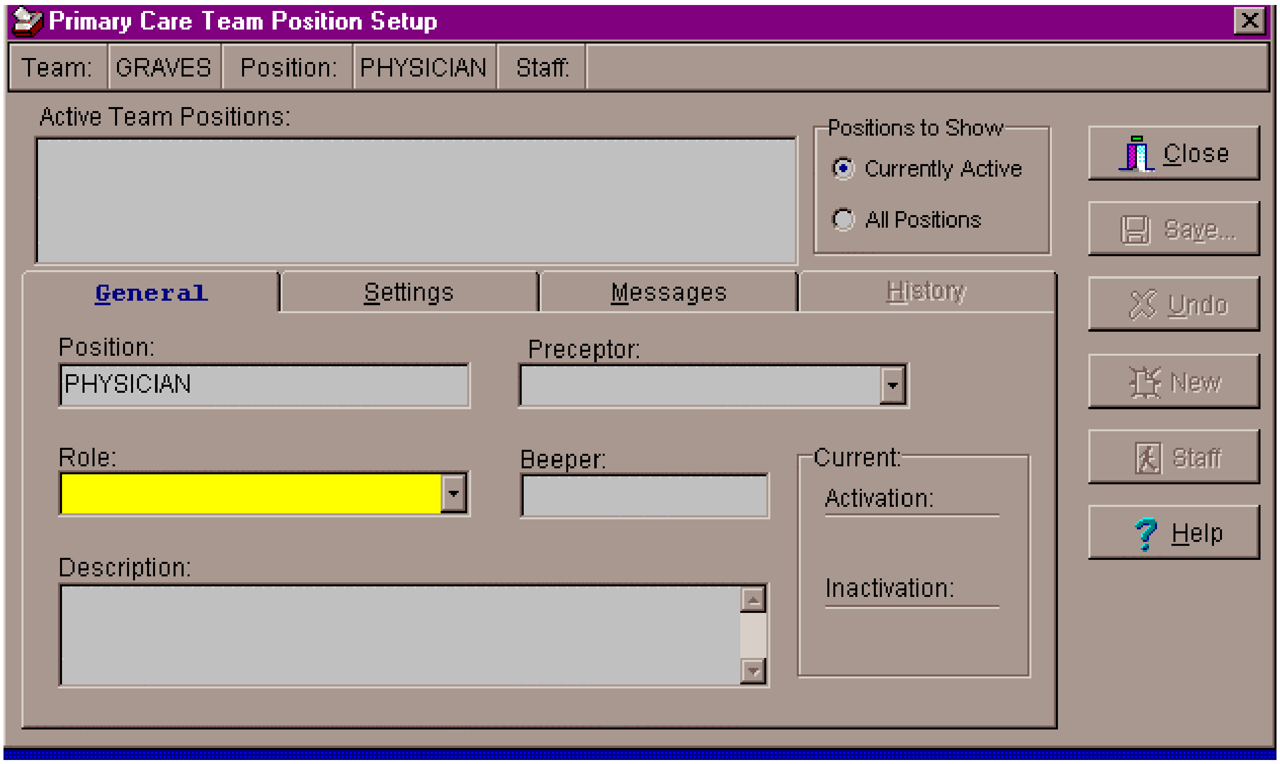
Displays team positions. The list box shows all team positions or only those currently active based on the Positions to Show selection. In order to select a position listed in the Team Positions list box, double click on the entry **or** click the entry and press the spacebar.

Positions to Show (radio button)

You may choose to show all positions associated with this team or only the currently active positions.

Team Setup
Assign Positions to a Team

GENERAL TAB



FIELD DESCRIPTIONS

***Position (text box)**
The name of the position, 3-30 characters in length. If the new position name matches an existing position name on the current team, you will be so notified and asked for a different name.

***Role (drop down list)**
This is a list of standard roles to which the position is mapped.

Team Setup
Assign Positions to a Team

GENERAL TAB

Description (text box)
Descriptive information you may wish to add specific to the position.

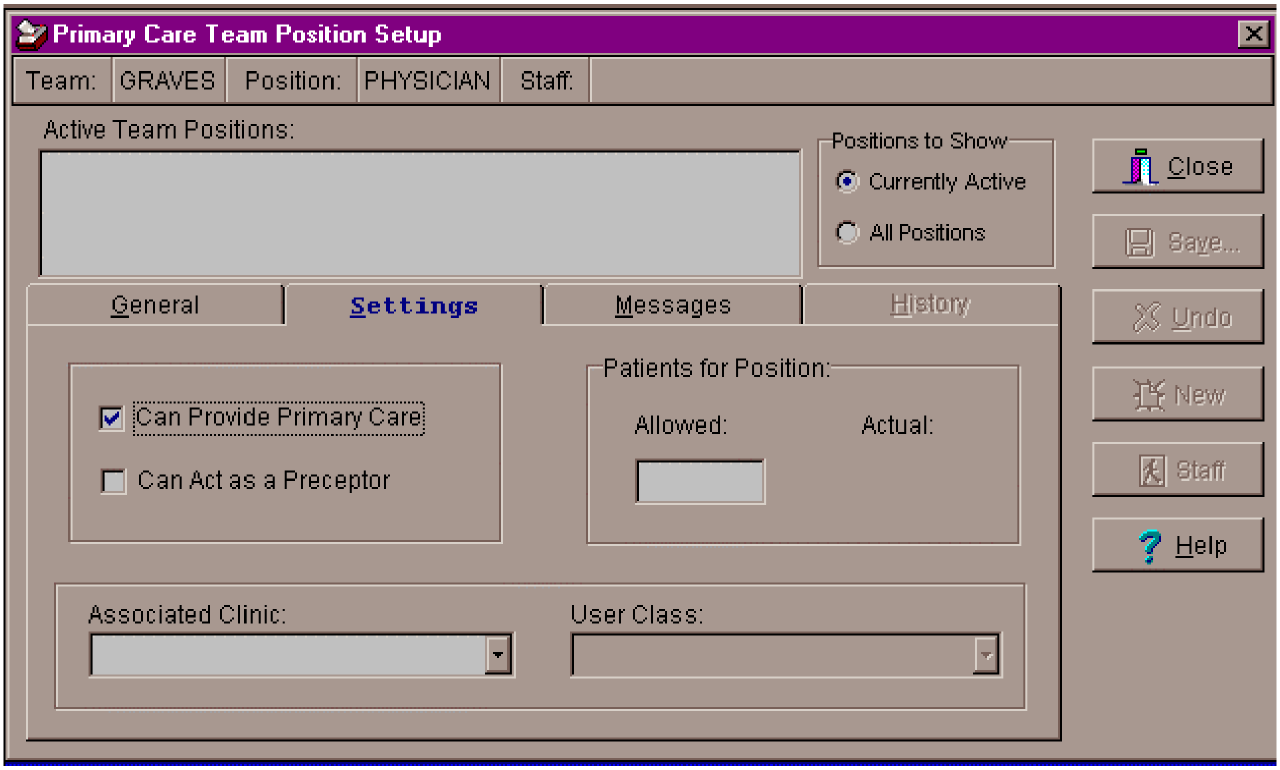
Preceptor (drop down list)
A position that acts as a supervisor or monitor for this position. Only active preceptors for this team are available for selection. It is preferable to create preceptor positions first so that preceptor positions will exist for the team.

Beeper (text box)
Beeper number for this position. This is a separate free text field. It is not linked to any other beeper or phone numbers in **V***IST***A**.

Current Activation/Inactivation
These label fields may display the most recent activation/inactivation date for the selected position.

Team Setup
Assign Positions to a Team

SETTINGS TAB



FIELD DESCRIPTIONS

Can Provide Primary Care (check box)

Check this box if this position can function as a primary care position. The team must have been designated as able to provide primary care for a position on the team to provide primary care. If this is not checked, patient and position assignments cannot be designated as either primary care practitioner or primary care attending.

Team Setup
Assign Positions to a Team

SETTINGS TAB

Can Act as a Preceptor (check box)

Check this box if this position can act as a supervisor to other positions within the team. All preceptor positions should be set up prior to setting up any other positions.

Associated Clinic (lookup box)

If there is an existing clinic you wish to associate with this position, it should be entered here. Making an entry here allows users to enter the team name to select the clinic in certain Scheduling options. On the GUI side, it allows users to enroll patients to the clinic after assigning the patient to the position. Only one clinic association per position is allowed.

Patients for Position: Allowed (text box)

The number of patients that should be assigned to this position. Users are not prevented from exceeding this number.

Patients for Position: Actual

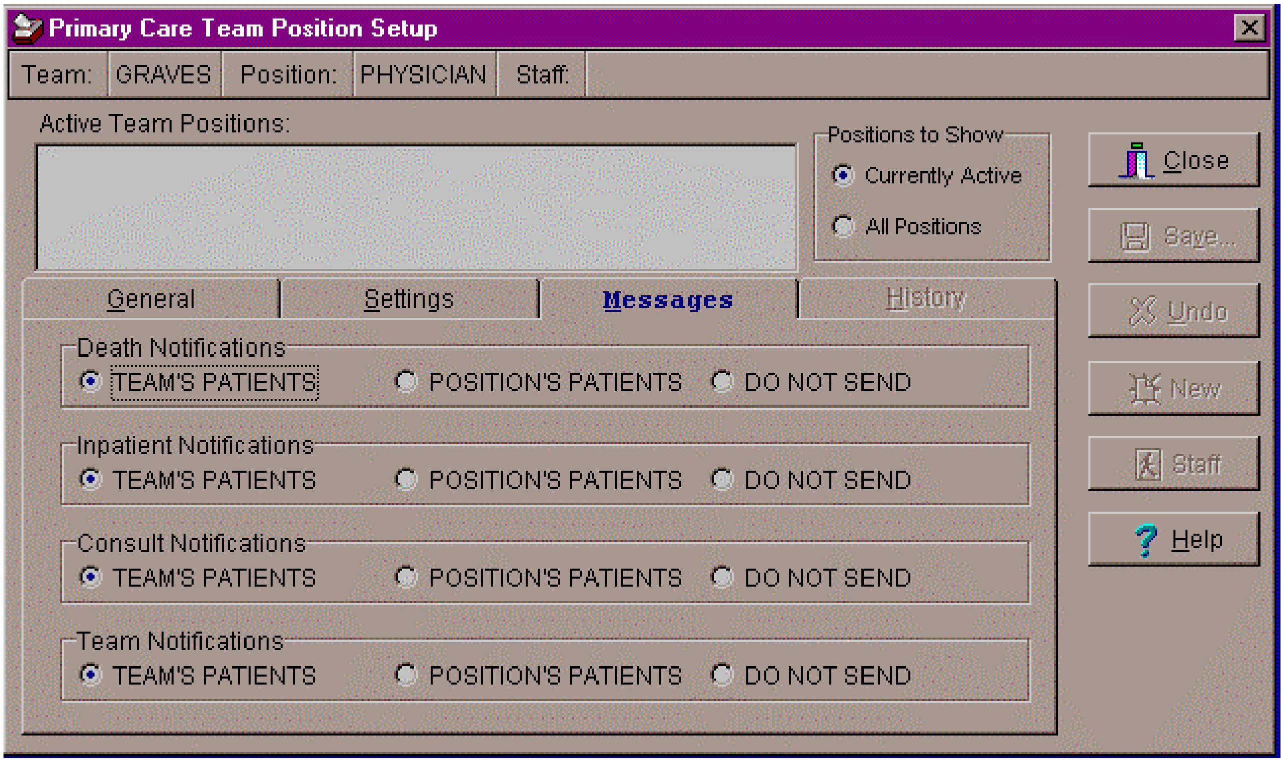
This is the number of patients that are currently assigned to this position.

*User Class (lookup box)

This is the user class that must be used when selecting an individual to fill this position.
NOTE: This field may be disabled at some sites.

Team Setup
Assign Positions to a Team

MESSAGES TAB



As part of PCMM, you are able to control the transmission of MailMan messages to team positions. MailMan messages are categorized into patient death, inpatient activity, consult activity, and team activity. Check the appropriate box for each type of notification.

When creating a new position, be sure to click the SAVE button after data entry on this tab to store all the information you have entered here and on the previous two tabs.

Team Setup
Assign Positions to a Team

MESSAGES TAB

BUTTON DESCRIPTIONS

Team’s Patients
If checked, the position will receive messages that are generated for all the team's patients.

Position’s Patients
If checked, the position will receive messages that are generated only for those patients in the team associated with the position.

Do Not Send
If checked, the position will not receive messages.

FIELD DESCRIPTIONS

Death Notifications (radio button)
Will notify the recipient of entry/deletion of the DATE OF DEATH field for a patient.

Inpatient Notifications (radio button)
Will notify the recipient of an inpatient admission/transfer/discharge for a patient.

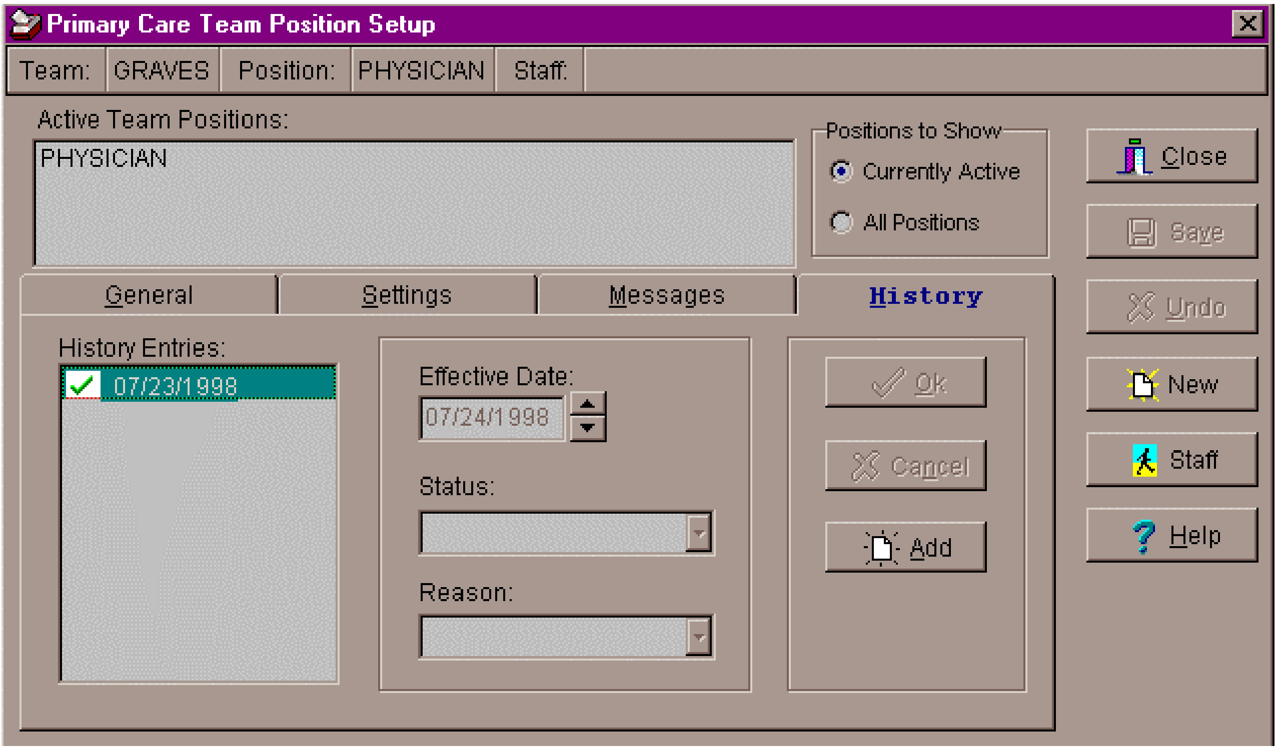
Consult Notifications (radio button)
Will notify the recipient of either an appointment being made or enrollment in a clinic in which the patient was not previously enrolled.

Team Notifications (radio button)
Will notify the recipient of a patient's team activity (assignment, discharge, etc.).

Team Setup
Assign Positions to a Team

HISTORY TAB

When creating a new position, no data entry is required on this tab. The History tab will not be available for a new position until the initial entry is saved.



FIELD DESCRIPTIONS

History Entries (list box)

This display shows the history of status change dates for this position. Double clicking an entry **or** clicking an entry and pressing the spacebar displays that entry's data in the edit boxes. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date.

Team Setup
Assign Positions to a Team

HISTORY TAB

***Effective Date**
This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date (month/day/year) must consist of two characters (i.e., 02/02/96).

***Status (drop down list)**
This is the status of the position as of the effective date.

***Reason (drop down list)**
This is the reason for the change in the position's status.

Team Setup
Assign Staff Member to a Position

If you have clicked on the Staff button on the Primary Care Team Position Setup form, begin at Step 4.

1. Select the TEAM|ASSIGN STAFF menu bar command.

2. Select the team from the Select Team dialog box and click the OK button.

3. Select the position and click OK.

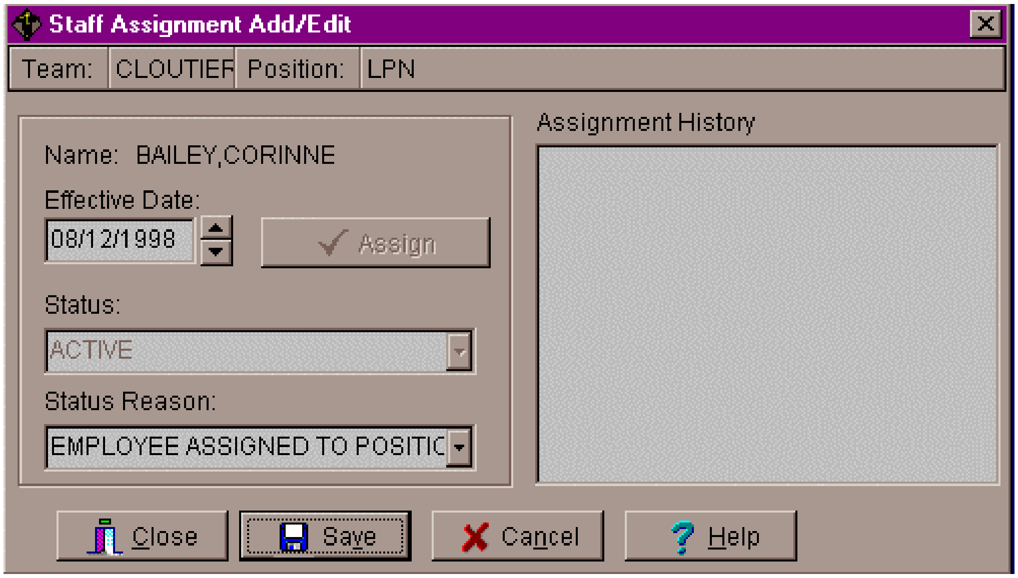
4. The Staff Assignment Add/Edit form appears. Click the ASSIGN button **or** choose the EDIT|ASSIGN MEMBER menu bar command.

5. The Staff Lookup dialog box appears. Type the staff member name (last,first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected.

6. The data fields on the Staff Assignment Add/Edit form will now be filled in. Click the SAVE button to accept these values, if correct. Close the form.

7. To inactivate the current assignment, click the INACTIVATE button **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Click the SAVE button.

Team Setup
Assign Staff Member to a Position



FIELD DESCRIPTIONS

Assignment History (list box)

This display shows the history of staff member assignment dates for the selected position. Double clicking an entry **or** clicking an entry and pressing the spacebar displays that entry's data in the edit boxes. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date

*Effective Date

This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date must consist of two characters (i.e., 02/22/96).

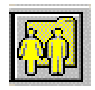
*Status (drop down list)

This is the status of the staff member as of the effective date.

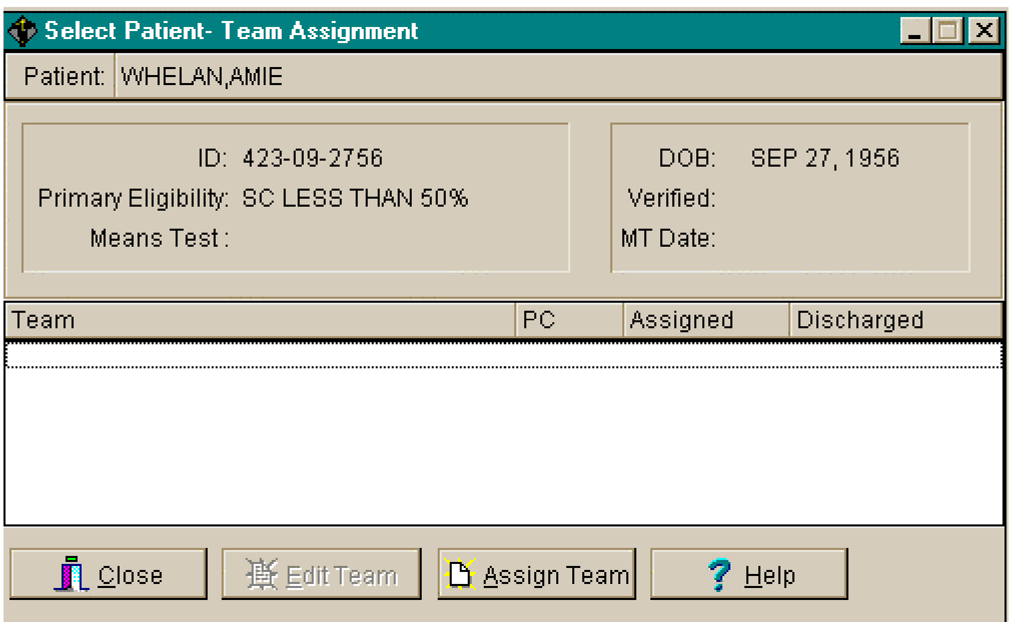
*Status Reason (drop down list)

This is the reason for the change in the staff member's status.

Team Setup
Assign Single Patient to Team/Position(s)

1. Click on the Assign Patients toolbar speedbutton  or select the PATIENT|ASSIGNMENT menu bar command.

2. The Patient Lookup dialog box appears. Type the patient name (last,first) and click the SEARCH button. If there is more than one match, possible matches will appear in the list box. Double click your selection **or** single click then click the SELECT button.

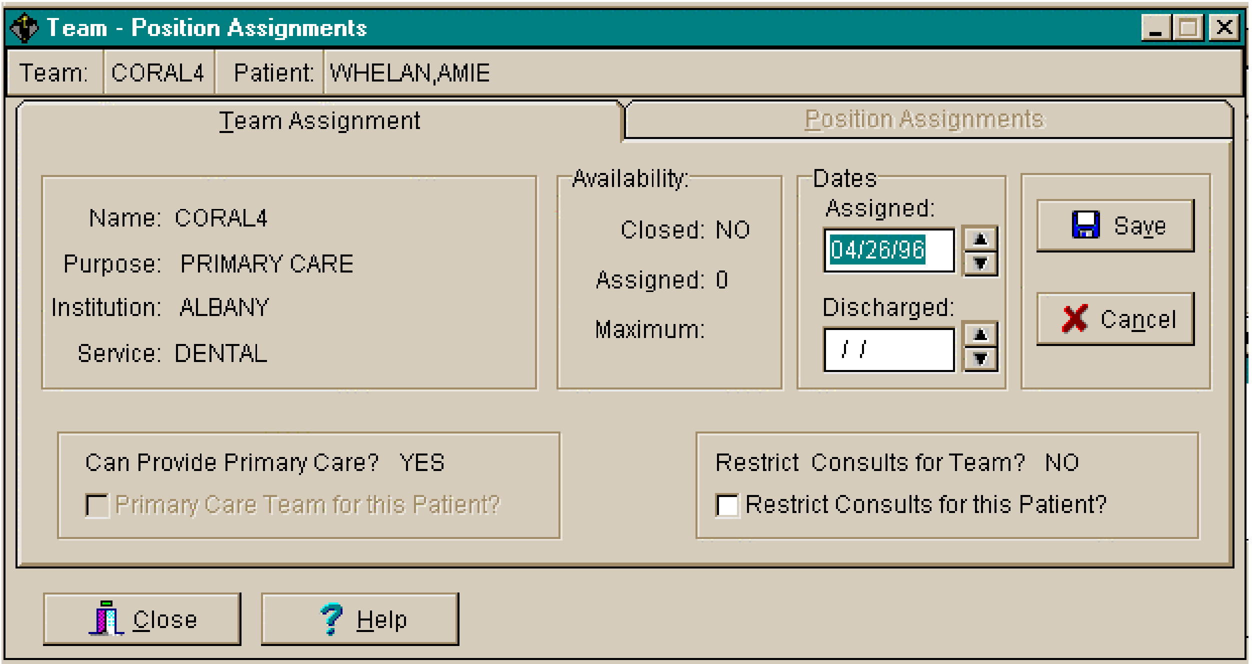


3. The Select Patient-Team Assignment form appears. Based on whether or not the SHOW ALL TEAM ASSIGNMENTS menu bar command is selected, all team assignments or only current assignments will appear in the list box. An asterisk in the PC column indicates the primary care team for this patient. Click the ASSIGN TEAM button and then select the team you wish to assign the patient to.

4. The Team - Position Assignments form appears. On the Team Assignment tab, check the Provide Primary Care and Restrict Consults for Team buttons as appropriate. Change the Date Assigned if necessary. Click the SAVE button. Enter the information on the Position Assignments tab (see POSITION ASSIGNMENTS TAB).

Team Setup
Assign Single Patient to Team/Position(s)

TEAM ASSIGNMENT TAB



FIELD DESCRIPTIONS

*Dates - Assigned
The date the patient is assigned to the team. Default will be today.

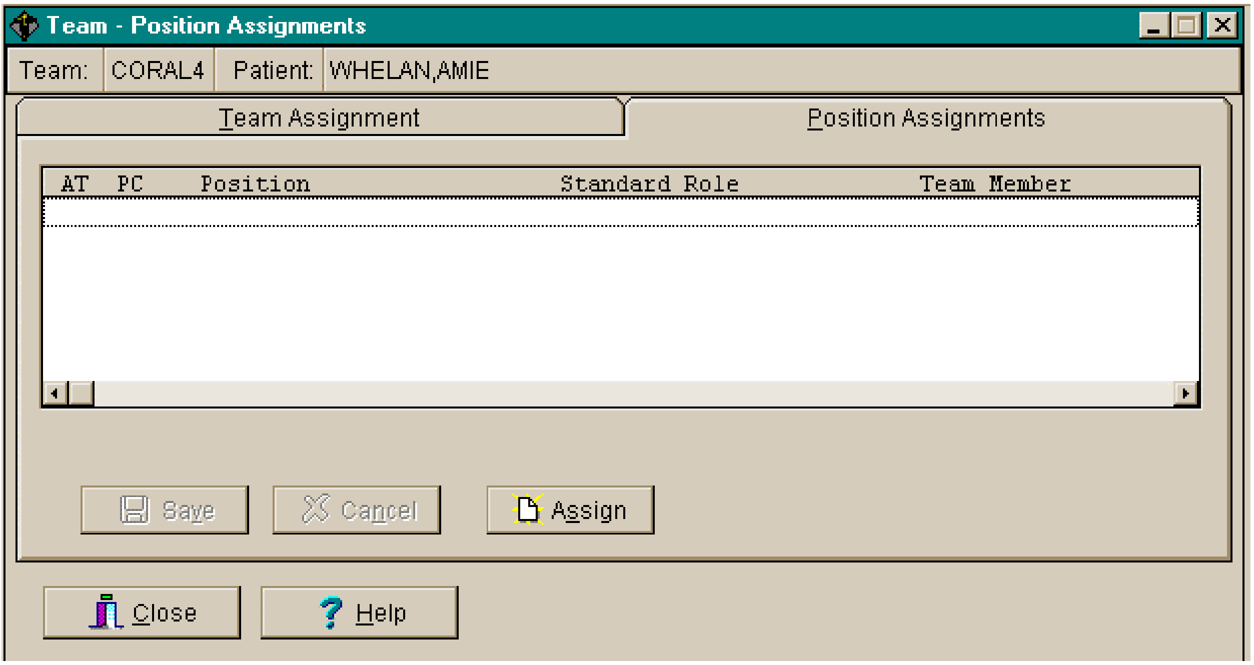
Dates - Discharged
The date the patient is discharged from the team.

Primary Care Team for this Patient? (check box)
Check this box if this team will be the primary care team for this patient. Patients may have only one team designated as their primary care team.

Restrict Consults for this Patient? (check box)
Check this box if you wish to restrict consults for this particular patient. This is only applicable to teams where consults are not restricted for the entire team.

Team Setup
Assign Single Patient to Team/Position(s)

POSITION ASSIGNMENTS TAB



The Position Assignments tab displays existing assignments to positions on the selected team. If the position is the primary care position for the patient or is an attending position, an asterisk will appear in the appropriate column. Other data provided includes position name, standard role, staff member, and whether or not the position can act as a preceptor.

1. Click the ASSIGN button. From the Select Position dialog box, choose the position you're assigning the patient to and click OK.

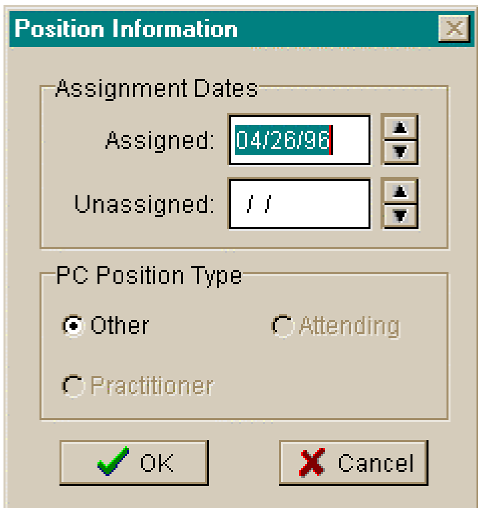
2. The Position Information dialog box appears. Edit the assignment date and position type, if necessary. Click OK. Then click the SAVE button on the Position Assignments tab.

If the position has been associated with a clinic and the patient is not already enrolled there, you will now be asked if you want to enroll the patient in that clinic. If you answer YES, you will be asked if this is an outpatient enrollment. If you answer NO to outpatient enrollment, the enrollment will automatically be an ambulatory care enrollment.

Team Setup
Assign Single Patient to Team/Position(s)

POSITION ASSIGNMENTS TAB

3. If you wish to assign this patient to another position on this team, click the right mouse button and select “new position”. See Step 2.



FIELD DESCRIPTIONS

***Assignment Dates**
Enter the date you are assigning the patient to the position.

Type (check box)
Check the appropriate position type radio button.

Team Setup
Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT

1. Select the PATIENT|MULTIPLE ASSIGNMENTS|TEAM ASSIGNMENT menu bar command.

2. Select a team through the Select Team To Assign To dialog box.

3. The Multiple Patient Assignments to Team form appears. Check the Primary Care Assignment and Restrict Consults check boxes if applicable.

4. From the *Select Patients by* drop down list, choose the method of patient selection.

5. Select the *clinic/stop code/clinic appointment/team* from the drop down list. If you click the GET LIST button, patient names will appear in the *Available to Assign* box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names. If your selection method is stop code or clinic appointment, you will be asked for a date range.
NOTE: If your selection method is *pc assignment with no team*, click the GET LIST button and then enter the effective date. Go to Step 6.

If you click the SELECT ALL button, you will get a confirmation box asking if you want to select all patients. If you click YES, all patients will **automatically** be assigned. No entries will appear in either list box and you do not need to proceed further.

6. Make your patient selections by clicking on the name.
NOTE: The lists of patients which currently appear in the *Available to Assign* and *New Assignments* boxes may be printed to a local (non-**V***IST***A**) printer via a popup menu. Access the popup menu by clicking the right mouse (with the cursor inside the box) while the list is active.

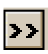
Team Setup
Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT

7. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.

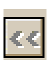
- Double clicking on an entry
- Click and drag
- Using the arrow buttons

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.



Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

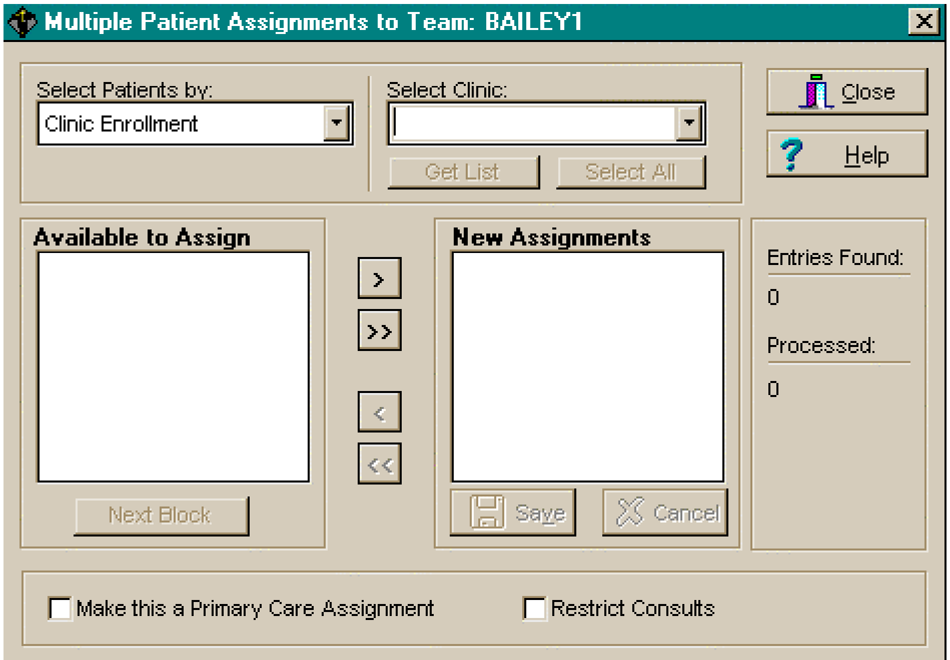


Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box.

8. Click the SAVE button. The selected patients are now assigned to the selected team.

Team Setup
Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT



FIELD DESCRIPTIONS

Select Patients by (drop down list)

You may choose to select the patients by clinic enrollment, stop code (active stop codes only), appointments, team enrollment, or pc assignment with no team.

Select {patient selection method} (lookup box)

Choose the clinic, stop code, clinic appointment, team, or pc patients with no pc team from which you wish to assign patients.

Available to Assign (list box)

Contains names of patients who are available to be assigned to the selected team.

New Assignments (list box)

Contains names of patients who will be assigned to the selected team once the SAVE button is clicked.

Team Setup
Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT

Entries Found - Processed
Displays the total number of entries found matching the selection criteria. Once the assignment is made and saved, the number of entries processed will be displayed.

Make this a Primary Care Assignment (check box)
Check this box if you want this team to be the primary care team for these patients. The team must be able to provide primary care.

Restrict Consults (check box)
Click in this box to prevent users from making consult appointments to clinics in which this team's patients are not enrolled. Patients who are listed as “restrict consults” may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the new Make Consult Appointment option (option requires security key). A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Team Setup
Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

1. Select the PATIENT|MULTIPLE ASSIGNMENTS|POSITION ASSIGNMENT menu bar command.

2. Select a team through the Select Team To Assign To dialog box.

3. Select a position through the Select Position in Team dialog box.

4. The Multiple Patient Assignments to: {Position} form appears. Check the appropriate radio button on the bottom of the form.

5. From the *Select Patients by* drop down list, choose the method of patient selection.

> **5a.** If you choose the "position enrollment" method of patient selection, the Select Team dialog box will appear.
>
> - To assign patients from one position to another position on the same team, select the team chosen at Step 2.
> - To assign patients from a position on one team to a position on another team, select the team **from** which you wish to assign patients.

6. Select the *clinic/stop code/clinic appointment/team/position* from the drop down list. If you click the GET LIST button, patient names will appear in the *Available to Assign* box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names. If your selection method is stop code or clinic appointment, you will be asked for a date range. **NOTE:** If your selection method is *pc assignment with no team*, click the GET LIST button and then enter the effective date. Go to Step 7.

If you click the SELECT ALL button, you will get a confirmation box asking if you want to select all patients. If you click YES, all patients will **automatically** be assigned. No entries will appear in either list box and you do not need to proceed further.

Team Setup
Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

7. Make your patient selections by clicking on the name. **NOTE:** The lists of patients which currently appear in the *Available to Assign* and *New Assignments* boxes may be printed to a local (non-**V***IST***A**) printer via a popup menu. Access the popup menu by clicking the right mouse (with the cursor inside the box) while the list is active.

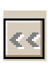
8. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the arrow buttons

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

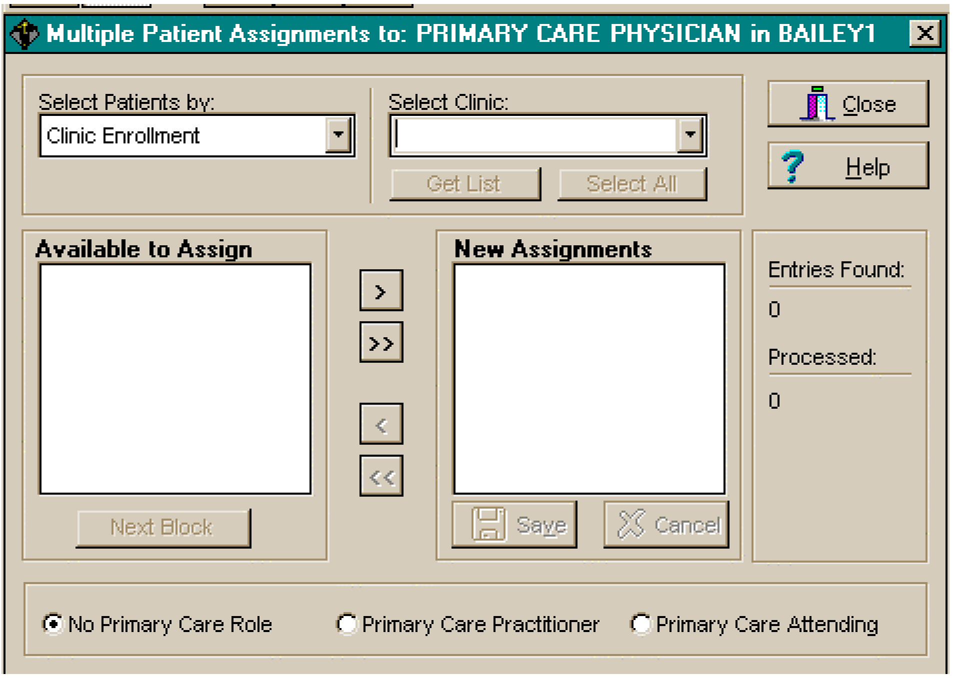


Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box.

9. Click the SAVE button. The selected patients are now assigned to the selected position.

Team Setup
Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT



FIELD DESCRIPTIONS

Select Patients by (drop down list)

You may choose to select the patients by clinic enrollment, stop code (active stop codes only), appointments, team enrollment, position enrollment, or pc assignment with no team.

Select {patient selection method} (lookup box)

Choose the clinic, stop code, clinic appointment, team, position, or pc patients with no pc team from which you wish to assign patients.

Available to Assign (list box)

Contains names of patients who are available to be assigned to the selected position.

Team Setup
Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

New Assignments (list box)
Contains names of patients who will be assigned to the selected position once the SAVE button is clicked.

Entries Found - Processed
Displays the total number of entries found matching the selection criteria. Once the assignment is made and saved, the number of entries processed will be displayed.

No Primary Care Role (radio button)
Click in this box if the position you are assigning to is not a primary care position for these patients.

Primary Care Practitioner (radio button)
Click in this box if the position you are assigning to is the primary care physician for these patients.

Primary Care Attending (radio button)
Click in this box if the position you are assigning to is the primary care attending physician for these patients.

Team Setup
Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT

1. Select the PATIENT|MULTIPLE REASSIGNMENTS|TEAM REASSIGNMENT menu bar command.

2. The Multiple Patient Team Reassignment form appears. Check the Primary Care Assignment and Restrict Consults check boxes if applicable.

3. From the *Select FROM Team* drop down list, select the team **from** which you are reassigning patients. From the *Select TO Team* drop down list, select the team **to** which you are reassigning patients. Patient names will appear in the *from team* list box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names.

4. Make your patient selections by clicking on the name.

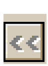
5. Move your selections from the *from team* list box to the *to team* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the arrow buttons


Moves the selected items from the *from team* list box to the *to team* list box.


Moves all the items currently in the *from team* list box to the *to team* list box.

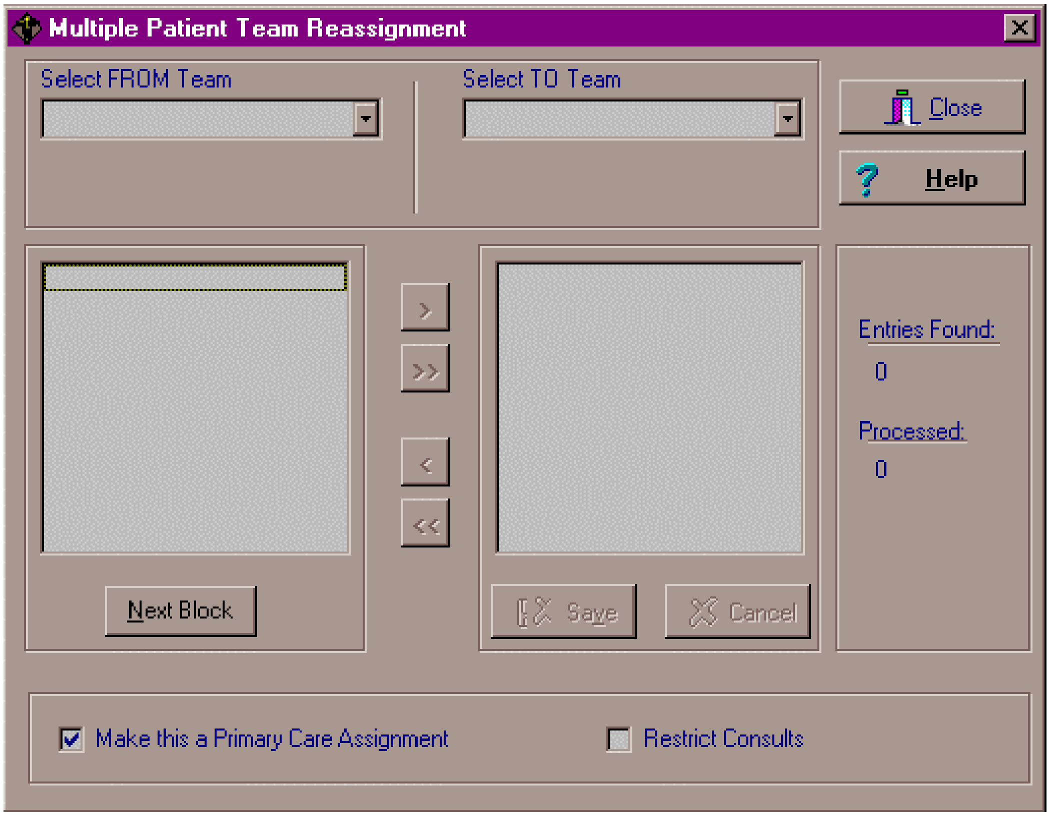

Moves the selected items from the *to team* list box to the *from team* list box.


Moves all the items currently in the *to team* list box to the *from team* list box.

6. Click the SAVE button. The selected patients are now reassigned to the selected team. Information concerning patients who were not reassigned will be provided to the user via a new MailMan message.

Team Setup
Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT



FIELD DESCRIPTIONS

Select FROM Team (drop down list)
Select the team from which you wish to reassign patients.

Select TO Team (drop down list)
Select the team to which you wish to reassign patients.

From Team (list box)
Contains names of patients who are available to be reassigned to the selected *To* team.

Team Setup
Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT

To Team (list box)
Contains names of patients who will be reassigned to the selected *To* team once the SAVE button is clicked.

Entries Found - Processed
Displays the total number of entries found matching the selection criteria. Once the reassignment is made and saved, the number of entries processed will be displayed.

Make this a Primary Care Assignment (check box)
Check this box if you want the *To* team to be the primary care team for these patients. The team must be able to provide primary care.

Restrict Consults (check box)
Click in this box to prevent users from making consult appointments to clinics in which the *To* team's patients are not enrolled. Patients who are listed as “restrict consults” may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the new Make Consult Appointment option (option requires security key). A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Team Setup
Reassign Multiple Patients to Team/Position(s)

(This functionality is not available at this time.)

POSITION REASSIGNMENT

1. Select the PATIENT|MULTIPLE REASSIGNMENTS|POSITION REASSIGNMENT menu bar command. The Multiple Patient Position Reassignment form appears.

2. Check the desired radio button under *Show Assignment Status* and select the date/date range under *Select Assignment Date Range* if applicable.

3. Select a team from the *Select FROM Team* drop down list and a position from the *Select FROM Position* drop down list. Patient names will appear in the *from team* list box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names.

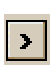
4. Select a team from the *Select TO Team* drop down list and a position from the *Select TO Position* drop down list.

5. Check the appropriate radio button on the bottom of the Multiple Patient Position Reassignment form.

6. Make your patient selections by clicking on the name.

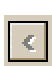
7. Move your selections from the *from team* list box to the *to team* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the arrow buttons

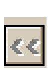


Moves the selected items from the *from team* list box to the *to team* list box.

Moves all the items currently in the *from team* list box to the *to team* list box.



Moves the selected items from the *to team* list box to the *from team* list box.



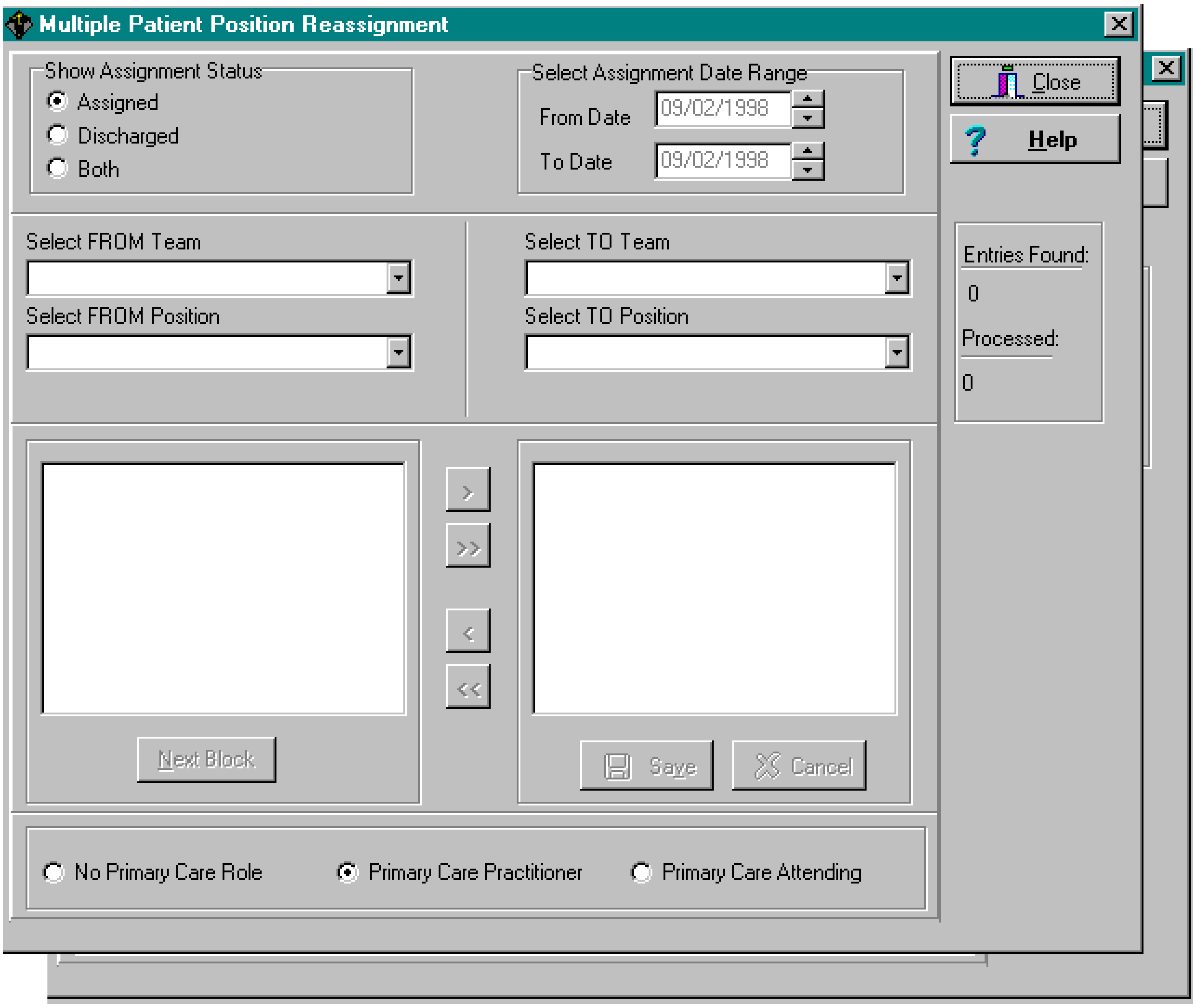
Moves all the items currently in the *to team* list box to the *from team* list box.

Team Setup
Reassign Multiple Patients to Team/Position(s)

(This functionality is not available at this time.)

POSITION REASSIGNMENT

8. Click the SAVE button. The selected patients are now reassigned to the selected team and position. Information concerning patients who were not reassigned will be provided to the user via a new MailMan message.



Team Setup
Reassign Multiple Patients to Team/Position(s)

(This functionality is not available at this time.)

POSITION REASSIGNMENT

FIELD DESCRIPTIONS

Show Assignment Status (radio button)
Select the assignment status for the list of patients which will appear in the FROM Position list box.

Assigned - Patients currently assigned to the selected FROM position.
Discharged - Patients who have been discharged from the selected FROM position.
Both - Patients in both the Assigned and Discharged categories.

Select Assignment Date Range
Select the date or date range for the selected assignment status.

Assigned - Date range will not be enabled.
Discharged - Both *from* and *to* date fields will be enabled.
Both - Only *from* date field will be enabled. Range will be to current date.

Select FROM Team (drop down list)
Select the team from which you wish to reassign patients.

Select FROM Position (drop down list)
Select the position from which you wish to reassign patients.

Select TO Team (drop down list)
Select the team to which you wish to reassign patients.

Select TO Position (drop down list)
Select the position to which you wish to reassign patients.

From Position (list box)
Contains names of patients who are available to be reassigned to the selected *To* team and position.

Team Setup
Reassign Multiple Patients to Team/Position(s)

(This functionality is not available at this time.)

POSITION REASSIGNMENT

To Position (list box)
Contains names of patients who will be reassigned to the selected *To* team and position once the SAVE button is clicked.

Entries Found - Processed
Displays the total number of entries found matching the selection criteria. Once the reassignment is made and saved, the number of entries processed will be displayed.

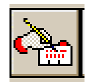
No Primary Care Role (radio button)
Click in this box if the position you are assigning to is <u>not</u> a primary care position for these patients.

Primary Care Practitioner (radio button)
Click in this box if the position you are assigning to is the primary care physician for these patients.

Primary Care Attending (radio button)
Click in this box if the position you are assigning to is the primary care attending physician for these patients.

Edit an Existing Team

TEAM SETUP

1. Click on the Team Setup toolbar speedbutton  or select the TEAM|SETUP menu bar command.

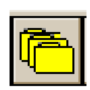
2. Select the team you wish to edit from the Select Team dialog box and click the OK button.

3. Enter the correct information on the General or Settings tabs of the Primary Care Team Profile form. Click the SAVE button after editing for the data to be stored.

4. On the History tab, first click the ADD button to add a new entry to the History Log. After all data is entered, the OK button becomes enabled. Click the OK button to add the new entry to the History Log and store the information.

POSITION SETUP

These steps cover editing of an existing position. If you are assigning a new position to a team, see "Assign Positions to a Team" under Team Setup.

1. Click on the Position Setup toolbar speedbutton  or select the TEAM|POSITIONS menu bar command.

2. Select the team whose positions you wish to edit from the Select Team dialog box and click the OK button.

3. Double click the position you wish to edit from the Teams Position list box on the Primary Care Team Position Setup form. Enter the correct information on the General, Settings, or Messages tabs. Click the SAVE button after editing for the data to be stored.

4. On the History tab, first click the ADD button to add a new entry to the History Log. After all data is entered, the OK button becomes enabled. Click the OK button to add the new entry to the History Log and store the information.

Edit an Existing Team

STAFF ASSIGNMENT

These steps cover editing where a staff member has already been assigned to a position. If you are initially assigning a staff member to a position, see "Assign Staff Member to a Position" under Team Setup.

1. Select the TEAM|ASSIGN STAFF menu bar command.

2. Select the team whose staff you wish to edit from the Select Team dialog box and click the OK button.

3. Select the position and click OK. The Staff Assignment Add/Edit form appears.

4. To inactivate the current assignment, click the right mouse button and select "Inactivate Current Member" **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Edit the effective date and status reason fields, if necessary. Click the SAVE button.

5. To assign a new staff member, click the right mouse button and select "Assign Member" **or** choose the EDIT|ASSIGN MEMBER menu bar command.

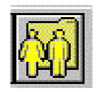
6. The Staff Lookup dialog box appears. Type the staff member name (last,first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected.

7. Edit the effective date and status reason fields, if necessary. Click the SAVE button. Close the form.

Edit an Existing Team

SINGLE PATIENT ASSIGNMENT

These steps cover editing where a patient has already been assigned to a team and/or position. If you are initially assigning a patient to a team/position, see "Assign Single Patient to Team/Position(s)" under Team Setup.

1. Click on the Assign Patient toolbar speedbutton  or select the PATIENT|PATIENT ASSIGNMENT menu bar command.

2. The Patient Lookup dialog box appears. Type the patient name (last,first) and click the SEARCH button. If there is more than one match, possible matches will appear in the list box. Double click your selection **or** single click then click the SELECT button.

3. The Select Patient-Team Assignment form appears. Based on whether or not the SHOW ALL TEAM ASSIGNMENTS menu bar command is selected, all team assignments or only current assignments will appear in the list box. An asterisk in the PC column indicates the primary care team for this patient. If the patient is assigned to more than one team, click on the team for which you wish to edit patient assignment. Click the EDIT TEAM button.

4. **Team Assignment -** If necessary, edit the primary care team and restrict consults fields on the Team Assignment tab and click the SAVE button. To discharge a patient from a team, enter the date of discharge. Tab off the field and click the SAVE button. If the patient is assigned to positions on the team, the Review Active Positions dialog box will now appear. Clicking the DISCHARGE button will automatically enter the same discharge date for the associated active positions. Clicking the CANCEL button will cause the just entered date of discharge to be deleted. This action prevents patients being actively assigned to a position without having a team assignment

Edit an Existing Team

SINGLE PATIENT ASSIGNMENT

5. Position Assignment - To unassign an existing position assignment, double click on the position on the Position Assignment tab. The Position Information dialog box appears. Enter the unassigned date and click OK. Click the SAVE button. (History for this position assignment will remain.)

NOTE: If a patient has been assigned to a position in error (data entry error), the following steps should be taken. Click on the position. Select the EDIT|POSITION ASSIGNMENT|DELETE menu bar command. Confirm the deletion by clicking the OK button. You must hold the SC PCMM DELETE security key to perform this action. (History for this position assignment will be deleted.)

Creating Autolinks

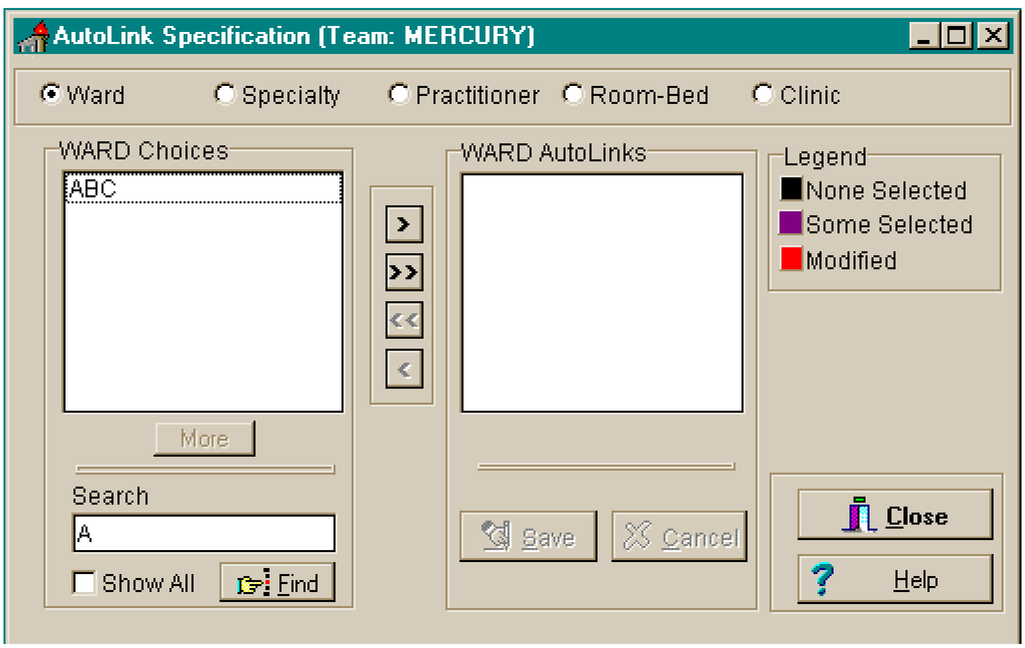
(This functionality has been disabled.)

If you have clicked on the Autolinks button on the General Tab of the Primary Care Team Profile form, begin at Step 3.

1. Select the TEAM|TEAM AUTOLINKS menu bar command.

2. Select a team through the Select Team Dialog Box.

3. The AutoLink Specification form appears. Choose the type of autolink from along the top of the form.



4. The *Choices* list box displays the entries for the selected item. You may click the SHOW ALL button to display all possible entries **or** type a few characters in the SEARCH box and click the FIND button for a limited selection. When first opened, the boxes default to A.

Creating Autolinks

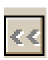
(This functionality has been disabled.)

5. Move your selections from the *Choices* list box to the *AutoLinks* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the arrow buttons

Moves the selected items from the *Choices* list box to the *Autolinks* list box.

Moves all the items currently in the *Choices* list box to the *Autolinks* list box.



Moves all the items currently in the *Autolinks* list box to the *Choices* list box.

Moves the selected items from the *Autolinks* list box to the *Choices* list box.

6. Click the SAVE button to create the autolinks. (You may save after establishing the autolinks for each individual item or wait until links are established for all items.)

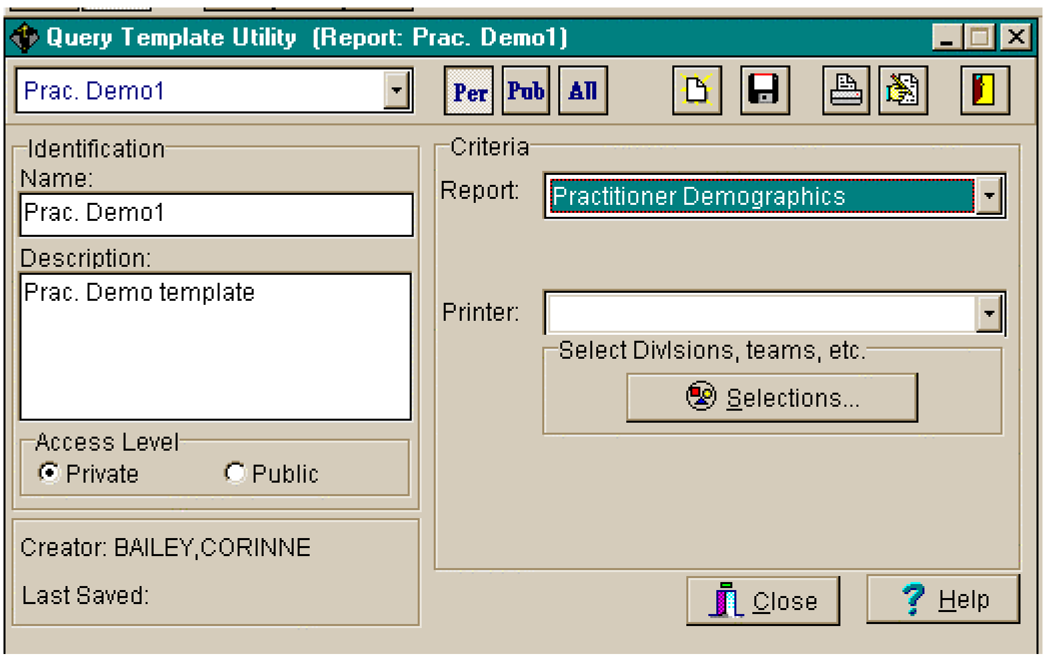
7. Repeat steps 3 through 6 for each autolink type.

NOTE: To obtain link detail information on an entry, click on the entry from one of the list boxes. Right mouse click and choose “Details”.

QUERY TEMPLATE UTILITY

The Query Template Utility is used to create report templates with a specified sort sequence and with specified category selections (divisions, teams, etc.). Templates may then be used to print the report in the future without having to make sort selections and category selections each time.

- Select REPORTS|SELECT REPORTS menu bar command. The Query Template Utility form appears.



- Click the desired category button at top of form **or** choose the TEMPLATE|OPEN menu bar command to display the desired template type(s) in the drop down list.

  Per (Personal) - your templates only
  Pub (Public) - public templates only
  All - both your personal and all public templates

Reports

QUERY TEMPLATE UTILITY

Create a New Template

1. Click the Create a New Template toolbar speedbutton or choose the TEMPLATE|NEW menu bar command.

2. Edit the Name text box and enter a description.

3. Assign either Private or Public access level to the template by clicking the correct radio button.

4. Enter the report criteria.

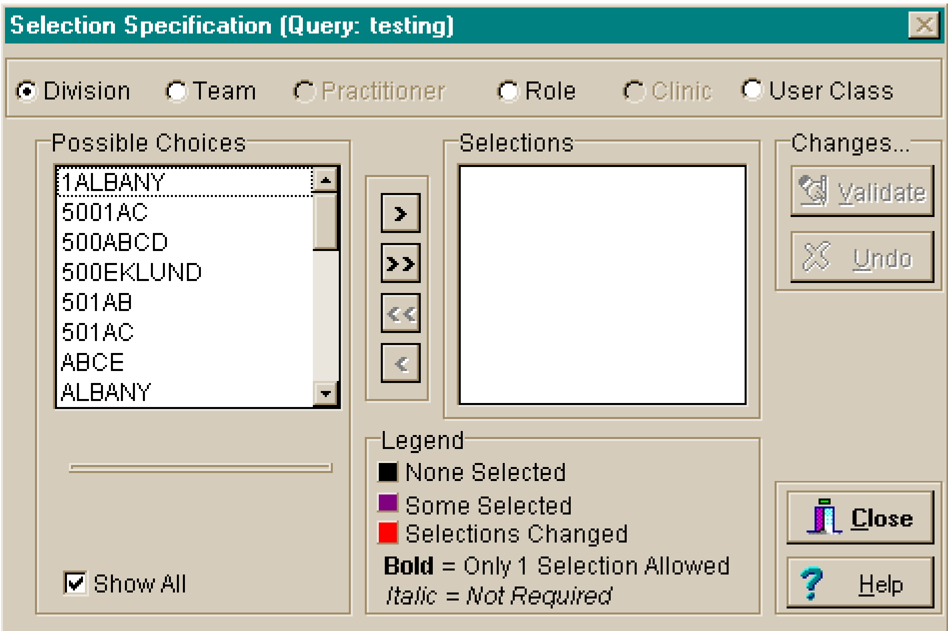
- Select the Report from the drop down list.
- If the Sort field is disabled, the default sort values will be used. If the Sort field is enabled, select the desired sort from the drop down list.
- Select the printer from the drop down list.
- In addition to the Sort and Printer fields, some reports have other unique data fields. These fields will appear below the Selections button on the form. (See Report Descriptions for a description of each PCMM report and any unique fields.)

5. Click the Selections Button and enter the report specifications (divisions, teams, etc.). (*See Create a New Template - Report Specifications*). To obtain selection detail information on an entry, click on the entry from either of the list boxes. Right mouse click and choose “Details”.

6. If you wish to save this template after you have made your selections, click the Save Template Changes toolbar speedbutton or choose the TEMPLATE|SAVE menu bar command.

QUERY TEMPLATE UTILITY

Create a New Template - Report Specifications



1. Choose the category along the top of the form for which you wish to select report specifications.

2. The *Possible Choices* list box displays the entries for the selected item. When first opened, the SHOW ALL field is checked which displays all possible entries. For a limited selection of entries, click the SHOW ALL check box to display the SEARCH box. Type a few characters in the SEARCH box and click the FIND button.

NOTE: If you have selected the Practitioner Demographics report, this form will appear differently. Since only one practitioner may be selected, the double arrow buttons are not visible. The SEARCH box appears instead of the SHOW ALL check box.

Reports

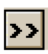
QUERY TEMPLATE UTILITY

Create a New Template - Report Specifications

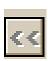
3. Move your selections from the *Possible Choices* list box to the *Selections* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the arrow buttons

Moves the selected items from the *Possible Choices* list box to the *Selections* list box.



Moves all the items currently in the *Possible Choices* list box to the *Selections* list box.



Moves all the items currently in the *Selections* list box to the *Possible Choices* list box.

Moves the selected items from the *Selections* list box to the *Possible Choices* list box.

4. Repeat Steps 1 to 3 for each category.

5. Click the Validate button. The validation action checks the relationships between the category selections (teams associated with correct division, clinics associated with correct division, etc.). If validation cannot be made, you will receive an Error Report explaining the inconsistency. Close the form.

Modify an Existing Template

1. Select the template name from the drop down list.

2. Edit the report criteria.

3. Click the Selections button and edit the report specifications (divisions, teams, ect.). Be sure to validate your selections when complete.

4. If you wish to save this template, click the Save Template Changes toolbar speedbutton or choose the TEMPLATE|SAVE menu bar command.

Reports

QUERY TEMPLATE UTILITY

Print Reports

Reports cannot be printed to the screen using the graphical user interface. They must be sent to a printer. These same reports may be printed to both the screen and to a printer through the Scheduling software.

To print a report from a template:

- Select the template name from the drop down list and click the Print Report toolbar speedbutton or choose the TEMPLATE|PRINT menu bar command.

To print a report not set up in a template:

- Click the Create a New Template speedbutton.
- Select the report name and report criteria.
- Click the SELECTIONS button and choose the report specifications. Be sure to validate your selections when complete.
- Click the Print Report toolbar speedbutton. Do not save.

Restore

The TEMPLATE|RESTORE menu bar command will restore the selected template values to what they were at the time of the last save.

Save As

Use the Save As function to save an existing query under a different name.

- Select the template name from the drop down list.
- Select the TEMPLATE|SAVE AS menu bar command and rename the template. Change the description if desired.
- Follow steps 2 through 4 under Modify an Existing Template.

Set Default

To set a template as your default value, select the template name from the drop down list and click the Set your Default Template to Current toolbar speedbutton or choose the TEMPLATE|SET DEFAULT menu bar command.

Delete

To delete an existing template, select the template name from the drop down list. Select the TEMPLATE|DELETE menu bar command. Click OK.

Reports

REPORTS DESCRIPTIONS

Below is a description of each PCMM report and any unique fields (shown in italics). For more detailed information on the reports, see PCMM Reports under Section 3 of this manual.

Detailed Patient Enrollments

Lists patients and the clinics in which they are enrolled. May be used prior to team/position assignments in order to help validate clinic enrollments.

Team Assignment - List/Don't List patients assigned to primary care.

Individual Team Profile

Displays basic team definition information.

Patient w/Team Assignments

Lists patients along with selected team information.

Practitioner Demographics

Displays administrative information for a chosen practitioner. Can only select one practitioner per report.

Practitioner's Patients

Identifies the size and constituents of a practitioner's patient panel.

Summary Only - Check to only print totals on the report.

Summary of Teams

Reports the number of patients assigned for each practitioner currently assigned to the team.

Team's Members

Shows basic information on the team and member practitioners. May be used to review which practitioners were assigned to a team during a certain time period.

Data Range - Print the report for this date range.

Team's Patients

Lists a team's patients and the clinics in which they are enrolled.

Include Patient Status - Print what patient status on report:
AC, OPT, or both (All).

Stand-alone Options

This section includes the option documentation for the Mass Team/Position Unassignment and Patient Team Position Assignment Review options. These options are distributed with patch SD*5.3*148 and are not distributed as part of any existing menu. They are intended for IRM or select ADPAC personnel.

Mass Team/Position Unassignment

Introduction

The Mass Team/Position Unassignment option can be used to unassign a large number of patients from an active team or an active position using the List Manager functionality. It is recommended that distribution of this option be limited.

The effective date you choose for the unassignment may be in the past, today, or in the future. The list of patients displayed contains all patients with assignments to the selected team/position, as of the selected effective date or after the effective date. Those with assignment dates in the future will show an asterisk (*) next to the assigned date.

When patients are unassigned from the team, they are also automatically unassigned from any associated position. If a position is associated with a clinic, you are given the opportunity to also discharge patients from the clinic.

The following is an explanation of the actions available.

SA Select all patients on the list
DA Deselect all patients on the list
SP Select individual patients
DP Deselect individual patients
VA List all patients. Those selected will show a YES in the Selected column.
VS Only list patient that have been selected
VD Only list patients that have not been selected
UN Will queue the unassignment process after you say you want to continue

Stand-alone Options

Mass Team/Position Unassignment

Introduction

After you have selected the patients, choose the Unassign Patients action. A summary of the unassignments that will occur is displayed. You are then asked if you are sure you want to continue. A YES response immediately queues the unassignment process and the Task # is displayed. A NO response returns the screen to where it was before the Unassign Patients action was entered.

A confirmation MailMan message is generated from the utilization of the unassign action. It contains the team name and the effective date of the unassignment. The "Entry#" (shown for errors and for future assignments that are deleted) is the internal entry number of the deleted entry. It comes from the PATIENT TEAM ASSIGNMENT file (#404.42) or the PATIENT TEAM POSITION ASSIGNMENT file (#404.43). The following applicable information is also contained in the mail message.

Patients Processed
Lists number of patients unassigned, number still assigned due to error, total patients, and any associated clinic discharges.

Clinic Discharges
Lists any associated clinic discharges. The position and associated clinic are displayed.

Error List
Lists those patients still assigned and the reason why.

Unassigned List
Lists those patients unassigned and, for team unassignment, unassignments which were automatically made from associated positions.

Stand-alone Options

Mass Team/Position Unassignment

Example

```
Select Type of Mass Unassignment: Team//   <RET>
Effective Date: T-1//  <RET>   (AUG 05, 1998)
Select TEAM NAME:  LIDSTER


>>> Checking to see if any team positions are associated with clinics...
----------------------------------------------------------------------------
             Team            : LIDSTER
             Position        : PHYSICIAN-ATTENDING
             Associated Clinic: 0RTHO

>>> Do you want to discharge patients from this clinic? (Yes/No)    Y   YES


...SORRY, THIS MAY TAKE A FEW MOMENTS...


Mass Team Unassignment         Aug 06, 1998 08:07:09      Page:    1 of    1
    Team: LIDSTER                            Total: 6  Selected: 0

Proposed Effective Date: 08/05/1998          View: ALL
         Selected  Patient Name        ID              Assigned     Unassigned
1                  JONES,FRED          006-89-0909    08/12/97
2                  PATCH,ELLIE         009-12-4321    04/30/97
3                  POLLSON,JOHN        123-00-9899    01/16/98
4                  RAYMOND,GENE        124-87-2290    09/22/97
5                  SULLIVAN,JAMES      078-33-4122    05/04/98
6                  YOUNG,WENDELL       083-44-5634   *08/24/98


          * Future Date
SA  Select All           VA  View All            UN  Unassign Patients
DA  DeSelect All         VS  View Selected
SP  Select Patients      VD  View DeSelected
DP  DeSelect Patients                            QU  Quit
Select Action: Quit//  SA   Select All

...EXCUSE ME, JUST A MOMENT PLEASE...
```

Stand-alone Options

Mass Team/Position Unassignment

Example

```
Mass Team Unassignment         Aug 06, 1998 08:07:09      Page:    1 of    1
    Team: LIDSTER                           Total: 6  Selected: 0

Proposed Effective Date: 08/05/1998          View: ALL
         Selected  Patient Name        ID             Assigned     Unassigned
1           Yes    JONES,FRED          006-89-0909    08/12/97
2           Yes    PATCH,ELLIE         009-12-4321    04/30/97
3           Yes    POLLSON,JOHN        123-00-9899    01/16/98
4           Yes    RAYMOND,GENE        124-87-2290    09/22/97
5           Yes    SULLIVAN,JAMES      078-33-4122    05/04/98
6           Yes    YOUNG,WENDELL       083-44-5634   *08/24/98


          * Future Date
SA  Select All            VA  View All             UN  Unassign Patients
DA  DeSelect All          VS  View Selected
SP  Select Patients       VD  View DeSelected
DP  DeSelect Patients                              QU  Quit
Select Action: Quit//  UN   Unassign Patients



----------------------------------------------------------------------------
                      Team Unassignment Definition
----------------------------------------------------------------------------
    Team              : LIDSTER
    Effective Date    : 08/10/1998
    # of Patients     : 6

    Clinic Discharges:    Position                 Associated Clinic
                          --------                 -----------------
                          PHYSICIAN-ATTENDING      ORTHO

Are you sure you want to continue? No//   YES

Task#: 5692

Enter RETURN to continue:  <RET>
```

Stand-alone Options

Mass Team/Position Unassignment

Example

Example of MailMan Message

```
Subj: Mass Team Unassignment Information  [#68602] 06 Aug 98 08:07  35 Lines
From: POSTMASTER (Sender: BAILEY,CURTIS)  in 'IN' basket.   Page 1  **NEW**
------------------------------------------------------------------------------

Mass Team Unassignment has been completed.

             Team: LIDSTER
             User: POSTMASTER
   Effective Date: 08/06/1998

 Patients Processed
   Unassigned     : 6
   Errors/Warnings: 0    (still assigned)
   Total          : 6

Clinic Discharges:   Position                     Associated Clinic
                     --------                     -----------------
                     PHYSICIAN-ATTENDING          ORTHO

 Error List:
 ===========
    No errors to report.


 Unassigned List:
 ================
 Patient                           ID
 -------                           --
 JONES,FRED                        006-89-0909
 PATCH,ELLIE                       009-12-4321
     >>> Position assignment to PHYSICIAN1 was unassigned.
     >>> Position assignment to NURSE was unassigned
 POLLSON,JOHN                      123-00-9899
     >>> Position assignment to PHYSICIAN-ATTENDING was unassigned.
         >>> Discharged from ‘ORTHO’ clinic
 RAYMOND,GENE                      124-87-2290
     >>> Position assignment to PHYSICIAN1 was unassigned.
     >>> Position assignment to NURSE was unassigned
 SULLIVAN,JAMES                    078-33-4122
     >>> Position assignment to PHYSICIAN1 was unassigned.
 YOUNG,WENDELL                     083-44-5634
     >>> Future team assignment deleted.
         Assignment Date: 08/24/98   Entry#: 3874
     >>> Position assignment to PHYSICIAN1:
         >>> Future position assignment deleted.
             Assignment Date: 08/24/98   Entry#: 2447


Select MESSAGE Action: IGNORE (in IN basket)//
```

Stand-alone Options

Patient Team Position Assignment Review

Introduction

The Patient Team Position Assignment Review option makes a comparison of the entries in the PATIENT TEAM POSITION ASSIGNMENT file (#404.43) and the PATIENT TEAM ASSIGNMENT file (#404.42). It checks that the position assignment active timeframe is within the team assignment active timeframe.

The current PCMM software is designed to prevent timeframe discrepancies. However, older versions of PCMM did allow these timeframe problems to occur. This report has been designed to help sites correct these problem assignments.

The report is in the form of a mail message and lists those position assignments that fall outside the team assignment active timeframe. Each entry in the mail message will display team name, position, patient name, error, position assigned/unassigned date, and team assigned/unassigned date.

Example

```
Select Team: ALL//  BLUE
Select another Team:  RED
Select another Team:  <RET>

>>> Task#: 388578

    This task will send a MailMan message to you containing
    the results of the position assignment review.

>>> Press RETURN to continue:  <RET>
```

Stand-alone Options

Patient Team Position Assignment Review

Example

```
Subj: Patient Team Position Assignment Review  [#70086] 04 Sep 98 10:41  32 Lines
From: POSTMASTER (Sender: BURNS,JEROME)    in 'IN' basket.   Page 1  **NEW**
-----------------------------------------------------------------------------

In order to correct the following active positions with discharged team
assignments, please refer to the documentation for the Patient Team Position
Assignment Review option found in the Stand-alone Option Section of the
Scheduling User Manual PCMM Appendix.


   Teams Reviewed:
       BLUE
       RED


   Patient Team Position Assignments Reviewed:     12
   Number of Assignments with Problems       :      3  ( 25.00%)

 =============================================================================
 Team: BLUE                 Position: PRIMARY CARE PHYSICIAN
         Patient: BAILEY,GEORGE B (1010)
           Error: Position Assigned Date is BEFORE Team Assigned Date
                    Position Assigned Date: 04/25/1996
                        Team Assigned Date: 04/28/1996
 -----------------------------------------------------------------------------
 Team: BLUE                 Position: PRIMARY CARE PHYSICIAN
         Patient: SMITH,ALICE (0144)
           Error: Position Assigned Date is BEFORE Team Assigned Date
                    Position Assigned Date: 08/28/1998
                        Team Assigned Date: 08/30/1998
 -----------------------------------------------------------------------------
 Team: RED                  Position: PHYSICIAN
         Patient: KILMIRE,MICHAEL J (7964)
           Error: Position Unassigned Date is AFTER Team Unassigned Date
                         Team Unassigned Date: 04/01/1997
                     Position Unassigned Date: 07/09/1997
 -----------------------------------------------------------------------------


Select MESSAGE Action: IGNORE (in IN basket)//
```

Windows Conventions

STANDARD WINDOWS OBJECTS

These are the types of data entry fields located in standard windows forms.

Check Box

Toggles between a YES/NO, ON/OFF setting. Usually a square box containing a check mark or *x*. Clicking the box or pressing the spacebar toggles the check box setting.

Command Button

The Command button initiates an action. It is a rectangular box with a label that specifies what the button does. Command buttons that end with three dots indicate that a subsidiary screen may be evoked by selecting the command.

Date Field

Identified by "__/__/__" or a date "mm/dd/yy". Will usually have an associated popup calendar. Double clicking with the mouse inside the date edit box, or tabbing to the edit box and then pressing the F2 key, displays the calendar. Clicking on the desired date, or using the arrow keys to move to a date and then pressing the spacebar, selects the date. Each component of the date (month/day/year) must consist of two characters (i.e., 02/02/96). The selected entry will not be effective until you tab off or exit from the date field.

Drop Down List

A list box containing an arrow button on the right side which displays one entry at a time. Choose from a vertical list of choices. Select the entry you want by clicking the list entry. You cannot type in this box, only select an item from the list. Once an entry is selected, it cannot be deleted - only changed. If <None> is the last entry, selecting it will clear the list entry. If <More> is the last entry, selecting it will display additional entries. The selected entry will not be effective until you tab off or exit from the drop down list.

F2 Key

Where there is an additional action which may be taken on a field, pressing the F2 key will initiate that action.

Windows Conventions

STANDARD WINDOWS OBJECTS

Faded Background
Fields that appear with a faded background are currently disabled.

List Box
Box which shows a list of items. If more items exist than can be seen in the box, a scroll bar appears on the side of the box. Selecting an entry from a list box requires either double clicking the entry or single clicking the entry and pressing the spacebar.

Lookup Box
Choose from a vertical list of choices. By typing in a few characters and pressing the ENTER or TAB key, a list of matching entries drops down. Select the entry you want by clicking the list entry. Entering a question mark and then pressing ENTER or TAB, or clicking the down arrow on an empty edit field, gives a complete listing of available entries. If <More> is the last entry, selecting it will display additional entries.

Memo Field
This field is equivalent to a word-processing field.

Non-White Background
Items in fields that appear with a non-white background can be selected but cannot be modified directly in that field.

Radio Button
Radio buttons appear in sets. Each button represents a single choice and normally only one button may be selected at any one time. For example, MALE or FEMALE may be offered as choices through two radio buttons. Click in the button to select it.

Right Mouse Button or Shift F10
You may click the right mouse button or press Shift F10 for a popup box of menu items.

Tab Key
Use the TAB key or the mouse to move between fields. Do not use the RETURN key. The RETURN key is usually reserved for the default command button or action (except in menu fields).

Windows Conventions

STANDARD WINDOWS OBJECTS

Text Box
Type the desired characters into the edit box. The selected entry will not be effective until you tab off or exit from the text box.

FORM BUTTONS
Buttons which appear on tab pages apply only to that tab and not the entire form. If there are action buttons on both the tab page and the form, the tab button should normally be clicked first.

Add
Anytime you reach a screen and the ADD button is enabled, you must first click the ADD button before entering any information.

Assign
Used to assign a staff member or a patient to a position.

Autolinks - *(This functionality has been disabled.)*
Opens the Autolinks form used to establish linkages between a team and wards/beds/clinics/practitioners, etc. (for OE/RR).

Cancel
Cancels the latest entry (up until the OK or SAVE button is clicked).

Close
Closes the window. If there are any changes that have not been saved, you will get a confirmation message asking you if you want to continue without saving; save before exiting; or cancel the close action and return to the window.

Edit
Used to edit position information.

Find
Used to quickly find an entry. Enter the search string and click the OK button

Help
Provides help for the area you are currently working in.

Windows Conventions

FORM BUTTONS

New
Used to open up a dialog box from which you can enter a new team or position.

OK
Adds the new entry after the data has been entered.

Positions
Opens the Primary Care Team Position Setup form. If the team has no active positions, the New Position dialog box will appear.

Save
Saves all changes made since the last save action. If you attempt to save and all required fields have not yet been completed, you will receive notification that the required fields must be completed before saving.

Search
After at least three characters are typed in a lookup dialog box, clicking the Search button will bring up matching entries.

Staff
Opens the Staff Assignment Add/Edit form.

Undo
Undoes all changes made since the last save action and redisplays the original data.

Troubleshooting Guide

DIALOG BOX HELP

Inactivate Team
A team cannot be inactivated until all positions associated with that team are inactivated.

Position Status
A position cannot be inactivated if is associated with a clinic.

Status Date Change
Changing a date may impact other applications using the history data.

Unable to Delete Position
A position cannot be deleted if any of the following conditions are present. Check for any of these conditions and remove/delete before continuing.

- history status entry other than initial activation entry
- clinic associated with the position
- staff member assigned
- patient assigned

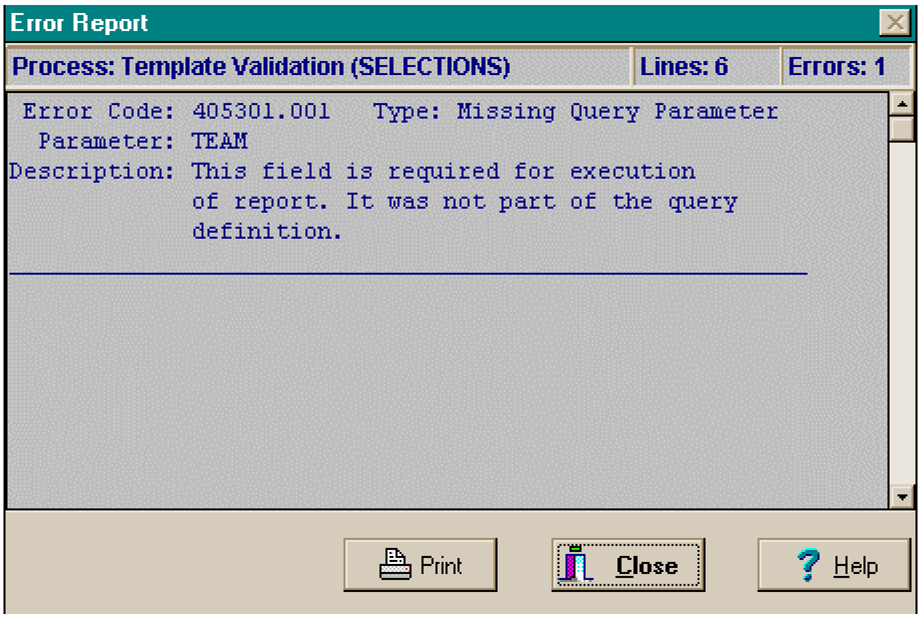
Unable to Delete Team
A team cannot be deleted if any of the following conditions are present. Check for any of these conditions and remove/delete before continuing. Once a team is in use, it may only be inactivated not deleted.

- history status entry other than initial activation entry
- position assigned
- patient assigned

Troubleshooting Guide

ERROR REPORT WINDOW

Below is an example of the Error Report Window which may appear if a specified action cannot be processed. A description of the error will appear in the window. You may print the error message. It will print to a windows device and not a **V***IST***A** device.



Process - Shows what action was being taken at the time of the error.

Lines - Number of lines in the error message.

Errors - Number of errors being reported in the error message.

PCMM Business Rules

The PCMM “business rules” provide information on how some of the PCMM fields will be handled for team and team positions. These rules are not intended to be all encompassing, but to allow some basic checking within the system to ensure data integrity.

A. TEAM SETUP GENERAL INFORMATION

The deletion of any team is not permitted once positions or patients are assigned to the team. If a team is created in error, you will be able to remove it up until this time. Once a team is in use, you may inactivate it, but not delete it. However, it would be possible under these rules to “delete” all positions assigned to the team, then delete the team.

The team name can be changed, but it must be a unique entry. Any name entered to replace an existing team name will be checked. If there is already a team with that name, whether active or inactive, replacement will not be allowed. You will be asked to confirm all name changes.

B. TEAM HISTORY

- When adding a new entry to the team history, the effective date, the status, and the reason for the entry must be completed before the entry can be saved.
- When adding a new entry, the effective date for the new entry cannot be earlier than a previous entry in the history. For example, a new entry that would reactivate a team that was inactivated on September 1, could not have a date earlier than September 1.
- You cannot have two consecutive entries of the same status.
- You can only delete the latest date entry in the history list. Once another entry has been made which supersedes a previous entry, that entry can no longer be deleted. For example, if the latest history entry for a team is September 1, that entry could be deleted. Any entry earlier then September 1 could not be deleted.
- The date for an existing entry can only be changed if it does not conflict with any of the other entries in the history. For example, given three entries with dates of July 7, August 11 , and August 31, the August 11 entry could be changed to any date between July 7 and August 31. Since there may be other packages using this data in the future, changing a date could cause potential problems. Therefore, changing dates should be reserved for only those occasions when an entry was made in error. If you change an existing date, you will be asked to confirm it.

- The reason for any history entry can be changed. It would be up to the user to insure that the new reason was appropriate for the status of the entry.
- The status cannot be changed for an existing entry. With the present version, there are only two status values - active and inactive. If additional status values are added later, then this rule will need to be revisited.
- In order for a team to be inactivated, all positions and staff assignments must be inactivated.

C. TEAM POSITION GENERAL SETUP

The deletion of any position is not permitted if any of the following conditions are in effect.

- There is a staff member assigned to the position.
- There is a clinic associated with the position.
- There are patients assigned to the position.
- There are status entries.

If a position is created in error, you will be able to remove it up until you assign a patient to it, or change its current status. Once a position is in use, you may inactivate it, but not delete it.

The position name can be changed, but it must be a unique entry within the team. You can use the same name for any number of different teams, but not within the same team. Any name entered to replace an existing name will be checked. If there is already a position with that name within the team, whether active or inactive, it will not be allowed. You will be asked to confirm all name changes.

PCMM Business Rules

D. TEAM POSITION HISTORY

The rules for team position history will generally follow the rules for team history.

- When adding a new entry to the team position history, the effective date, status, and reason for the entry must be completed before the entry can be saved.
- When adding a new entry, the effective date for the new entry cannot be earlier than a previous entry in the history. For example, a new entry that would reactivate a position that was inactivated on September 1, could not have a date earlier than September 1.
- You cannot have two consecutive entries with the same status. At present, the only statuses are active and inactive. This means if the current entry is active, your next entry will have to be inactive. Eventually, there may be additional statuses available.
- If you inactivate a position and there is a staff member currently active in this position, you will be asked if you want to inactivate the staff member as well. If you answer YES, the position, as well as the staff member, will be inactivated with a status of “Position Inactivated”. If you answer NO, neither the position nor the staff member will be inactivated.
- You can only delete the latest (last) history entry. Once another entry has been made which supersedes a previous entry, that entry can no longer be deleted. For example, if the last history entry for a position is September 1, that entry could be deleted. Any entry earlier then September 1 could not be deleted.
- The date for an existing entry can only be changed if it does not conflict with any of the other entries in the history. For example, given three entries with dates of July 7, August 11 , and August 31, the August 11 entry could be changed to any date between July 7 and August 31. Since there may be other packages using this data in the future, changing a date could cause potential problems. Therefore, changing dates should be reserved for only those occasions when an entry was made in error. If you change an existing date, you will be asked to confirm it.
- The reason for any history entry can be changed. It would be up to the user to insure that the new reason was appropriate for the status of the entry.

PCMM Business Rules

E. TEAM POSITION STAFF ASSIGNMENT

- The status of an existing entry cannot be changed. With the present version, there are only two status values - active and inactive. If additional status entries are added, this rule would have to be revisited.
- When assigning a new staff member to a team position, the member's name, the effective date, the status, and the reason for the assignment must be completed before the assignment can be entered.
- When adding a new assignment to a position, the effective date for the assignment cannot be earlier than a previous assignment. For example, if the effective date for inactivation of Dr. Welby was September 7, then the effective date for the activation of Dr. Kildare cannot be earlier than September 8.
- If there is already an active staff member, you will only be allowed to inactivate the current staff member.
- Only the last assignment entry can be deleted.
- For an existing assignment, the date can be changed only if it does not conflict with any of the other assignment entries. For example, given three entries with dates of July 7, August 11 , and August 31, the August 11 entry could be changed to any date between July 7 and August 31. Since there may be other packages using this data in the future, changing a date could cause potential problems. Therefore, changing dates should be reserved for only those occasions when an entry was made in error. If you change an existing date, you will be asked to confirm it.
- The reason for any assignment entry could be changed. It would be up to the user to insure that the new reason was appropriate for the status of the entry.
- For an existing entry, the status may be changed only if it is the latest assignment entry in the log, and then only if its current status is inactive. For example, if Dr. Kildare is the active staff member as of September 8, and it is known that Dr. Watson will be taking over on November 12, then an *inactive* entry for Dr. Watson can be made. Once an inactivation entry for Dr. Kildare was made, the status of Dr. Watson's entry could be changed to active.
- The name of the current active staff member can be changed. This should only be done for those cases where the name was entered in error. The normal procedure for changing the active staff member would be to inactivate the current member and add an assignment for a new member. You will be asked to confirm a name change on an existing entry.

PCMM Business Rules

F. PATIENT TEAM ASSIGNMENT

- Only teams that have the “Primary Care Team” box checked on the Settings Tab of the Team Setup Screen may be assigned as a primary care team. **Note:** This field determines if a team can ever be a primary care team. The team's purpose does not affect the ability of a team to function as a primary care team.
- On any given date, a patient is only permitted to have one primary care team.
- In the Multiple Patient Assignments to a Team option, patients currently assigned to the team are not listed in the “Available to Assign” list.
- In the Multiple Patient Assignments to a Team option, if “Make this a Primary Care Team Assignment” is checked, patients who do not have a primary care team will be assigned this team as their primary care team. Patients who have already been assigned to another team as their primary care team will not be assigned to the team.

G. PATIENT TEAM POSITION ASSIGNMENT

- In order for a position to be designated as the primary care practitioner position, the following conditions must exist: the team must be able to provide primary care; the team must be designated as the patient’s primary care team; the position must be able to provide primary care; and the patient can have no other position designated as primary care practitioner.
- In order for a position to be designated as the primary care attending position, the following conditions must exist: the team must be able to provide primary care; the team must be designated as the patient’s primary care team; the position must be able to provide primary care; and the patient can have no other position designated as primary care attending.
- On any given date, a patient is only permitted to have one primary care practitioner position.
- On any given date, a patient is only permitted to have one primary care attending position.
- Only positions from the patient's primary care team may serve as either the primary care practitioner or the primary care attending.
- In the Multiple Patient Assignments to a Position option, selected patients who have not yet been assigned to the position's team and are permitted to be assigned to the position (e.g., no conflicts with primary care assignments) will be assigned to the team at the same time.

PCMM Business Rules

In the Multiple Patient Assignments to a Position option, if one of the two primary care roles is checked (primary care practitioner or primary care attending), it is possible for the assignment to fail if:

- ♦ The patient is already assigned to another position for this primary care role.
- ♦ The patient is already assigned to another team as his primary care team.

- In the Multiple Patient Assignments to a Position option, if a patient has not yet been assigned a primary care team, and the patient is permitted to be assigned to one of the two primary care roles (primary care practitioner or primary care attending), the patient will be assigned to the team as his primary care team.

H. PROCESSING POSITION REASSIGNMENTS

1. Destination Position *Is* Preexisting

- Source and Destination *are* PC Assignments
    - ❖ Discharge or delete existing destination position
    - ❖ Discharge or delete existing destination team
    - ❖ Create new destination team assignment
    - ❖ Create new destination position assignment
    - ❖ Discharge all source positions
    - ❖ Discharge source team

- Source and Destination *are not* PC Assignments
    - ❖ Edit position assignment to show new activation date, remove future discharge if necessary
    - ❖ Team Assignment is future
        - ♦ Activate future team assignment
    - ❖ Discharge source position

PCMM Business Rules

2. Destination Position *Is Not* Preexisting

- Destination Team *is* Preexisting

    - Source and Destination *are* PC Assignments
        - Discharge or delete existing destination team
        - Create new destination team assignment
        - Create new destination position assignment
        - Discharge all source positions
        - Discharge source team

    - Source and Destination *are not* PC Assignments
        - Team assignment is future
            - Activate future team assignment
        - Create new destination position assignment
        - Discharge source position

3. Destination Team and Position *Are Not* Preexisting

- Source and Destination *are* PC Assignments
    - Create new destination team assignment
    - Create new destination position assignment
    - Discharge all source positions
    - Discharge source team

- Source and Destination *are not* PC Assignments
    - Create new destination team assignment
    - Create new destination position assignment
    - Discharge source position